

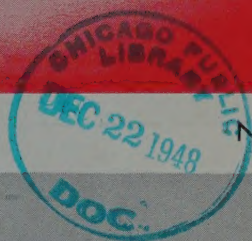
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FOREIGN TRADE

I. III

OTTAWA, MARCH 6, 1948

No. 62



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FOREIGN TRADE

OTTAWA, MARCH 6, 1948

Published Weekly

By

Foreign Trade Service

Department of Trade and Commerce

In This Issue

| | |
|--|-----|
| Eastern Caribbean—Unsettled Conditions follow Minor Boom.. | 438 |
| New Zealand—British Economic Crisis affects Reconversion.... | 442 |
| Canada—Trade Commissioners provide Variety of Assistance.. | 445 |
| Sierra Leone—Economy depends upon Agricultural Production.. | 449 |
| Newfoundland—Herring to be supplied U.S. Zone of Germany.. | 451 |
| Malta—Imports from Canada chiefly Wheat and Flour..... | 452 |
| South Africa—Industrial Census indicates higher Production.... | 453 |
| India—External Trade shows Increase on Basis of Values..... | 454 |
| United States—Higher Acreage harvested but Yield Lower.... | 457 |
| Malaya—Dollar-Earning Capacity invaluable to Sterling Economy | 459 |
| Angola—Transportation System being Extended..... | 462 |
| Chile—Purchases from Canada appreciably Higher Last Year.. | 464 |
| United Kingdom—Government warns Industry to hold Wage Level | 467 |

Regular Features

| | |
|--|-----|
| Foreign Exchange Quotations..... | 484 |
| Foreign Trade Service Abroad..... | 481 |
| Trade and Tariff Regulations..... | 469 |
| Trade Commissioners on Tour..... | 470 |
| Transportation..... | 471 |
| Departures from Montreal..... | 471 |
| Departures from Halifax..... | 471 |
| Departures from Saint John..... | 474 |
| Departures from Vancouver-New Westminster..... | 477 |

COVER SUBJECT—Fur farm at "Swissvale", Prince Edward Island, whose pens and other buildings extend over an area of forty acres. Pelt production in Canada established a record value of \$43,870,541 during the 1945-46 season, 6,870,000 pelts having been taken from wild fur-bearing animals and 431,000 from those raised on some 6,500 ranches. The value of the latter, however, amounted to about 25 per cent of the aggregate value. Canada has sent a display of fox and mink pelts to the International Fur and Leather Fair, which will be held in Basle, Switzerland, commencing next Monday.

National Film Board Photo.

Eastern Caribbean Unsettled After Enjoying Minor Boom Period

Due to pent-up demand and favourable trading conditions, goods poured into colonies during first part of last year—Cessation of sterling convertibility and sudden imposition of severe exchange and import controls threw business into state of uncertainty.

By T. G. Major, Canadian Trade Commissioner

PORT OF SPAIN, February 2, 1948.—Commodities of all kinds poured into Barbados, British Guiana, Trinidad, the Leeward Islands and Windward Islands last year during the period of sterling convertibility and relaxation of import controls. Due to the pent-up demand for consumer goods, a moderate boom occurred, and Canada secured a share of the business that developed. Import totals increased substantially, as the heavy backlog of orders, especially for textiles from the United States, was filled.

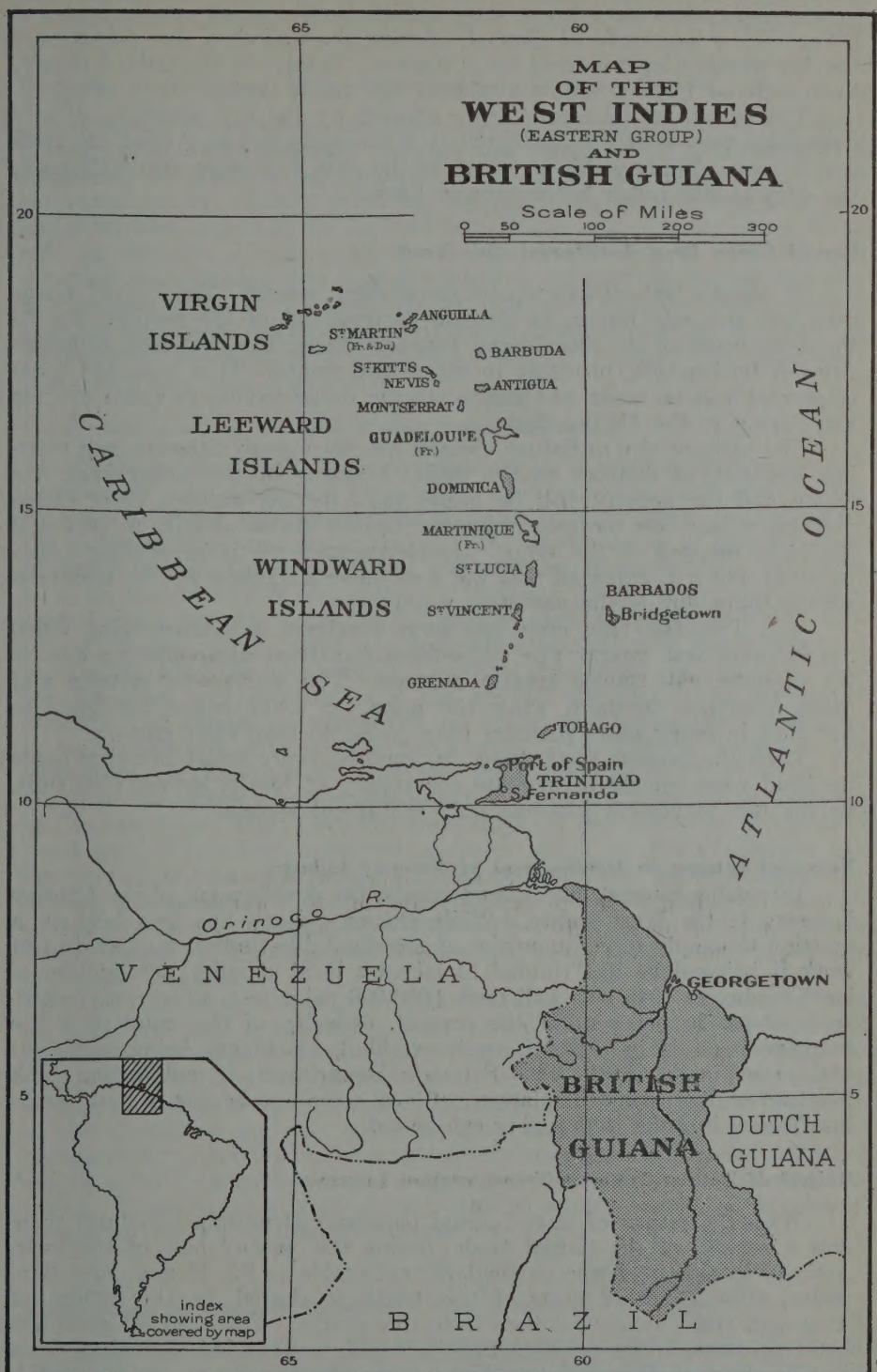
Rising prices in the exporting countries, together with large inventories in some lines, put a strain on the credit facilities of many retail firms in the larger colonies. Declines in purchasing power were evident towards the middle of the year, due partially to the cessation of work on United States bases in Trinidad, St. Lucia, Antigua and St. Thomas, and to the light sugar cane crops in some of the islands.

There was an increasing demand for goods needed for the development of secondary industries, and for the development of gold, lumber, bauxite and petroleum resources. The mechanization of the sugar industry and the renovation of equipment in sugar factories, together with the expansion and mechanization of rice production, created a market for agricultural and other machinery. Despite a shortage of materials, residential, commercial and industrial construction was active throughout the year.

The cessation of sterling convertibility last August, followed by the sudden imposition of severe exchange and import controls, threw business into a state of uncertainty, which had not been resolved by the end of the year. The volume of imports continued at a high level, as a result of the arrival of goods already in transit when the controls were imposed. At the same time, retailers with ample stocks experienced an active Christmas trade. The precarious credit position of many firms was restored by the cessation of imports of goods in long supply.

Sugar and Cotton Crops Affected by Severe Drought

The onset of the rains in the latter part of 1947 could not overcome the effect of the worst drought in many years. Hardest hit were sugar and cotton. The improvement in moisture conditions, however, brought some relief, but earlier damage will lead to reduced yields this year. While the overall yield for sugar during 1948 should not be much less than the previous year, Trinidad and Barbados will have greatly reduced crops. The 1947 crop in Trinidad was 110,000 tons compared with early estimates of 130,000 tons, while the 1948 crop is not expected to reach 100,000 tons. The crop in Barbados has been estimated by the Director of Agriculture at only 80,000 tons. On the other hand, St. Kitts is expecting a record crop of 40,000 tons.



All indications point to an increased cocoa yield during the present year. High prices have led to the rehabilitation of many estates that had fallen into a bad state of disrepair during the period of low prices, and the dry weather has hindered cocoa disease. Estates in Grenada, however, have suffered from a severe attack of the cocoa beetle.

The cotton crop has also been affected by the dry weather. Plants have done very poorly to date, but it is too early yet to predict the 1948 cotton crop. While yields of cotton in the past year were generally good, the crop is still much below prewar figures.

Record Citrus Crop Anticipated This Year

Trinidad's last citrus crop set an all-time record. The United Kingdom was the only buyer, as Canada dropped out of the market, due to the lower prices of the Florida and Texas products. The next crop, although delayed by drought, promises to hit a new record. It is expected some shipments will be made to Canada, as the dollar-saving program hinders her buying in the United States.

The yield of rice in British Guiana has been good, although late reaping has delayed delivery to the mills. Planting of the spring crop has begun and the acreage will be larger than for the autumn crop. Rice machinery has been ordered from the United States and its arrival will facilitate reaping of the crop. Development work is proceeding satisfactorily and it is expected that the area under irrigation will be increased substantially during the next two years.

The Trinidad lime crop has been excellent, deliveries being 6,000 barrels over last year. The coffee crop has been disappointing due to the drought, with yields greatly reduced. The market for nutmeg and mace continues dormant, while the price for tonca beans has been so low that in many cases planters have failed to reap their crops.

With the present restrictions on imports, every effort is being made by local governments to increase the supply of locally grown foodstuffs. So far this movement has had only indifferent success.

Increased Interest in Development of Forestry Industry

Increasing interest has centred around the development of the forestry industry in the West Indies. While British Guiana has long been in a position to supply large quantities of merchantable timber, a great deal of work is being done in Trinidad to increase local supplies. Production of local lumber in 1946 was well over 2,000,000 cubic feet, which only represents about 30 per cent of the present capacity of the industry. The industry itself is in need of much overhaul, machinery being inefficient and often inadequate. The Forestry Department is cultivating teak plantations, increasing the planting of local wood and hoping to build roads into forests in order that timber can be cut.

Revival of Tourist Trade as Transportation Improved

With the return of more normal passenger steamship schedules there was a revival of the tourist trade during the second half of the year. Activity in this field was particularly noticeable in St. Thomas and Barbados, although other parts of the territory shared in the inflow of American and Canadian dollars from this source. The need for adequate hotel accommodation is particularly evident in Trinidad, British Guiana and the French West Indies. With improved schedules and more planes, air travel in the territory increased sharply. Reference should be made to the entry of British and South American Airlines, National Airlines

(U.S.A.), Linea Aeropostale Venezolana, and Air France, as well as the taking over of British West Indian Airways by British International Airlines.

Exchange Controls and Prices Diverting Business from Canada

Although the extent of the trend was not clear at the end of the year, it was evident that exchange controls and rising prices in Canada were combining to divert a considerable share of the import trade to other sources of supply. Chiefly benefiting from this will be the United Kingdom and Australia, although the Netherlands, France and possibly Hong Kong may participate. However, there was considerable lack of uniformity in applying the exchange and import control in the various British colonies, a condition which it is hoped will be corrected early in 1948. Special mention also should be made of the difficult financial position in which the Trinidad Government found itself as a result of its heavy flour subsidization policy and high flour costs.

Closer Association of Colonies Evolves from Conference

In the political field, the rising demand for a greater measure of self-government was stimulated by a conference on closer association of the British Caribbean colonies, held in Jamaica in September. Sponsored by the Colonial Office and under the personal chairmanship of the Secretary of State for the Colonies, it was attended by representative legislators from all the colonies in the Eastern Caribbean. From it evolved positive steps looking towards a customs union, a unified currency, a central shipping authority, and a continuing committee charged with the function of further exploring the possibilities of political federation. In British Guiana the franchise was extended and the elected portion of the legislature enlarged. In Trinidad a committee was set up to overhaul the constitution in such a manner as to increase the powers of the elected element in the legislature. In Bermuda the Governor introduced the policy of giving the leader of the largest group in the Assembly a voice in selection of members of the executive. With Grenada dissenting, the various units of the Leeward and Windwards approved a closer union of those colonies. In Surinam there was considerable political unrest, which led to an investigation by a commission from the Netherlands and definite proposals for local self-government. Martinique, Guadeloupe and French Guiana became "departments" of metropolitan France and sent elected members to the legislature in Paris.

The Caribbean Commission established a central secretariat in Port of Spain and held a meeting in that city in December. Apart from the necessary organization work involved in establishing the secretariat, the Commission initiated an extensive study of the possibilities of developing secondary industries in the American, British, Dutch and French territories in the Caribbean and the communication facilities of the area. It also commenced the publication of a monthly information bulletin and initiated weekly news broadcasts over stations in most parts of the dependent territories. These policies were in line with recommendations of the second session of the West Indian Conference held in St. Thomas in 1946.

Track Gauge in Southern Rhodesia 3 Feet 6 Inches

Reference was made in the February 14th issue of *Foreign Trade*, on page 289, to the track gauge of equipment built in Montreal for the Rhodesian Railways as 3 feet 9 inches. This should have read 3 feet 6 inches.

British Economic Crisis Affects Reconversion in New Zealand

Restrictions imposed on imports from dollar countries—Licences for purchases from Canada and United States issued for essentials only—Licensing schedule for 1948 unduly delayed—Exports in 1946-47 at record level—Import volume lower but value higher.

By P. V. McLane, Commercial Secretary for Canada

(Editor's Note—This is the first of a series of six articles on economic conditions in New Zealand, prepared for publication in *Foreign Trade*.)

WELLINGTON, February 1, 1948.—New Zealand experienced a number of difficulties in the reconversion of her wartime to peacetime economy, the most important outside influences being the international trade talks and the British economic crisis, with the subsequent shortage of dollars. There is serious concern for the plight of Great Britain, and a campaign has been instituted to assist that country. The most important single factor in the present program is the control of imports from hard-currency countries to save dollars. These controls will likely continue until the situation in Great Britain improves, and until the International Trade Agreement makes it possible for the non-dollar countries to secure markets in the dollar countries.

Import control regulations for 1948 were announced on August 8, and the basis for granting licences for the importation of goods was the ability of Great Britain to supply the requirements of New Zealand. Great care was to be exercised in making provision for importations from non-sterling areas. It was considered that New Zealand's overseas sterling funds were adequate, but allowances had to be made for expenditure on plant and machinery, and that under the circumstances these funds would not be depleted by expenditure on non-essentials. At the time it was stated that the period of availability for 1947 licences would not be extended beyond December 31, and that goods entered after that date would have to be charged against the 1948 licences.

Imports from Canada and the United States Restricted to Essentials

As the dollar crisis developed, however, it became apparent that New Zealand would have to make further efforts to conserve dollars and, on September 8, the Minister of Finance announced that all licences issued for imports requiring payment in dollars would be reconsidered. The Department of Industries and Commerce set about working out a program covering those goods which they considered essential and which could only be obtained from the United States or Canada. The final say, however, still remained with the Minister of Finance.

On September 18, the Minister announced that the dollar situation was even more difficult, that it was necessary for New Zealand imports from Canada and the United States to be restricted to goods which were absolutely essential and that licences which had already been issued be turned in for review. Those which covered essential goods were to be endorsed, so that the banks could make dollar exchange available. Naturally all these changes in the regulations were extremely confusing, but plans

were gradually worked out whereby no contracts would be repudiated and whereby goods which were to arrive even after the end of the year were to be taken care of.

Issue of Licences for 1948 Delayed

All this confusion however, meant that the 1948 schedule was held up, and revisions are still being made from time to time. It would appear that the issuance of 1948 licences is still not going smoothly, as some organizations have already received licences for 1948 while others are being held up. In other cases, part licences are being issued, with the promise that the applications will be reconsidered early next year.

This of course has made smooth trading very difficult, particularly in respect of commodities still in short supply in Canada. Both producers and importers find it impossible to make any definite plans. It would appear also that promises of deliveries from the United Kingdom are being given too much weight. Licences are being withheld for Canadian goods when in many cases the same commodities are being exported in considerable volume to the United Kingdom by Canada. A more clear-cut policy would certainly be to the advantage of Canadian exporters and their agents in New Zealand.

Delay in Granting Licences Cause of Concern

The question of delays in issuing import licences was reviewed by the Auckland Chamber of Commerce; a questionnaire was sent to their members asking for information with respect to their licences. It was found that the situation was alarming. Importers had generally been careful not to order in excess of their licences, but in some cases the goods had been subject to price increase since the orders were placed, and, in the current licences, provision had not been made for the higher figure. The delay in granting the additional licence to cover the increase was causing considerable concern.

It was also found that the delay in granting licences under the 1948 schedule would probably affect employment for the first six months of next year. Even if the basic allocations were made now, much of the goods would not arrive until June, 1948, and many firms would be at a loss to know what to do with their staffs after the goods received under the 1947 schedule had been disposed of. The Chamber of Commerce was of the opinion that, if licences were not granted shortly, New Zealand credit overseas would suffer. Letters of credit could not be issued until the licence was finally granted, and suppliers overseas were very concerned over payments for goods for which they had received tentative orders. The rush to ship goods to arrive in New Zealand before the end of the year has also caused congestion in both the ports and warehouses. Canadian exporters can expect their difficulties to continue throughout 1948.

Exports Reach Record Level

The following table shows the values of exports and imports for the year ended June 30, 1947, with corresponding figures for the years 1939 and 1946:

| | Exports | | Total Imports |
|------------|---------------------|---------------|---------------|
| | New Zealand Produce | Total Exports | |
| 1939 | £ 57,384,098 | £ 57,891,911 | £56,499,607 |
| 1946 | 88,808,053 | 90,673,856 | 62,646,851 |
| 1947 | 114,869,935 | 116,214,455 | 91,022,710 |

Exports for the twelve months ended June 30, 1947, reached record proportions, and the aggregate value of imports is the highest in recent years.

The following table shows the changes in value and volume between exports and imports:

| Year | Excess of Exports £ | Index Numbers | | | |
|------------|-------------------------------|--------------------------------------|--------|------------------|--------|
| | | Exports of New Zealand Produce | | Total Imports | |
| | | Value | Volume | Value | Volume |
| | | (Base, 1938-39=100) | | | |
| | | | | | |
| 1939 | 1,392,304 | 100 | 100 | 100 | 100 |
| 1946 | 28,027,005 | 155 | 104 | 111 | 69 |
| 1947 | 25,191,745 | 200 | 118 | 161 | 90 |

While the volume of New Zealand exports increased by 18 per cent over that for the base year, it is noteworthy that the index of value has doubled. In view of the fact that New Zealand has contracts with the United Kingdom for the sale of many of her basic exports at fixed prices and below world prices, this increase is not exactly what one would expect. However, there has been a heavy demand for and a great shortage of a large number of products which New Zealand exports and the prices of which have risen steeply. These items consist principally of sausage casings, calf skins, cattle hides, rabbit skins, sheep skins with and without wool, wool, and kauri gum.

Import Volume Lower but Value Higher

The volume of imports is slightly below the 1939 figure, but in value was increased by 61 per cent. It must be borne in mind, however, that New Zealand has prohibited the importation of a large number of high-cost luxury lines and that this increase does not include duties, sales tax, or mark-up for wholesalers, retailers and so forth. In view of the heavy increase in retail prices of imported goods, a much higher index of import prices might have been expected.

Quota Imports into the United States for January

Washington, February 11, 1948.—(FTS)—Preliminary figures issued by the Treasury Department show the standings of the quotas provided for under the General Agreement on Tariffs and Trade (provisionally effective January 1, 1948), from the beginning of the quota periods to January 31, 1948:

| | Total world quota | Reduction in duty from 1930 Tariff Act | Imports up to January 31, 1948 | |
|--|--|---|-----------------------------------|----------|
| | | | Quantity | Per cent |
| Whole milk | 3,000,000 gal. per calendar year. | 6½ to 2c per gal. | 542 gal. | .... |
| Cream | 1,500,000 gal. per calendar year. | 56 6/10 to 20c per gal. | 134 gal. | .... |
| Butter | 30,000,000 lb. 3 months from January 1, 1948. | 14c per lb. to 7c per lb. | 9,269 lb. | .... |
| Filleted fish, fresh or frozen: cod, haddock, hake, pol- lock, cusk and rosefish.... | 24,930,188 lb.* | 2½ to 1½c per lb. | 3,518,292 lb. | 14.1 |
| Certified seed potatoes..... | 2,500,000 bu. beginning September 15, 1947. | 75 to 37½c per 100 lb. | 1,592,418 lb. | 63.6 |
| White or Irish potatoes, other than seed | 1,000,000 bu. beginning September 15, 1947. | 75 to 37½c per 100 lb. | 671,049 bu. | 67.1 |

*A proviso to the General Agreement on Tariffs and Trade limits the imports for consumption at the quota rate to 6,232,547 pounds during the first three months of 1948.

Canadian Trade Commissioners Provide Variety of Assistance

Exporters and importers interested in foreign markets and new sources of supply may obtain much information from commercial envoys in thirty-two foreign countries—Initial approach for general data should be made to headquarters in Ottawa of Foreign Trade Service.

CANADIAN trade commissioners, as members of a large promotional organization having its headquarters in Ottawa and forty-two offices in thirty-two foreign countries, are in a position to assist manufacturers, exporters and importers. They study potential markets for specific Canadian commodities, report on the kind of goods required, competitive conditions, trade regulations, tariffs, shipping facilities and packaging requirements. These commercial envoys also seek new sources of supply, especially for raw materials required by industry in this country, and assist the foreign exporter in marketing his products in Canada.

The Canadian Trade Commissioner Service rests on solid foundations, which were laid in 1892, when the Department of Trade and Commerce came into existence. There were then only six "commercial agents" in the British West Indies and British Guiana, and one in Norway. Three years later a commercial agent was appointed in Sydney, Australia. The Canadian Commercial Agency Service was renamed the Canadian Trade Commissioner Service in 1907, when the number of its field force and the sphere of its operations were increased. Some indication of the growth in Canada's foreign trade during the last fifty-seven years is revealed by the following statistics. Domestic exports in 1891 were valued at \$88,600,000, compared with \$2,774,900,000 in 1947. Imports, on the other hand, were valued at only \$111,500,000 in 1891, compared with \$2,574,000,000 in 1947.

Reports Published in *Foreign Trade*

Reports on economic conditions in their respective territories are prepared by trade commissioners, and these are published in *Foreign Trade*. This also contains a number of commodity reports, information on trade regulations and tariff changes, a comprehensive transportation section and other commercial data of value to firms engaged in foreign trade. The annual subscription to *Foreign Trade* is one dollar, for delivery in Canada, and \$3.50 for delivery abroad. All applications and remittances should be forwarded to the King's Printer, Government Printing Bureau, Ottawa.

Enquiries of a general character concerning the demand for Canadian goods in foreign markets, trade regulations, customs duties, import restrictions imposed by other countries and other pertinent information should be addressed by exporters to the Foreign Trade Service, Department of Trade and Commerce, Ottawa. *All firms interested in exporting should be listed in the Exporters' Directory.* Application forms may be obtained from the Exporters' Directory Section, Export Division.

More specific information required by exporters should be obtained from Canadian Trade Commissioners in the territory concerned. A list of these trade commissioners, and the territories for which they are

responsible, are contained in each issue of *Foreign Trade*. General information of the following character can be provided:

- (a) Present and prospective market requirements.
- (b) Competition, domestic and foreign. Representative catalogues and prices may also be provided.
- (c) Best selling methods.
- (d) Reports on foreign firms, if not available at headquarters in Ottawa.

Detailed Information Available

Trade Commissioners can also:

- (a) Recommend responsible parties in a position to act as agents, distributors or buyers.
- (b) Assist such agents by introducing them to individuals or associations who may be interested in the purchase of Canadian products, and in other ways.
- (c) Furnish confidential information, when so requested, concerning the activities of a Canadian exporter's agent or firms to which sales have been made.
- (d) Indicate the most suitable advertising media for different commodities, and their adaptation to the special requirements of the community in which it is desired to sell a product.
- (e) Recommend the most satisfactory distribution of catalogues and price lists, and the display of samples.
- (f) Indicate the most suitable methods of distributing other trade literature and the costs involved.
- (g) Assist in the settlement of difficulties that may arise between Canadian exporters and their buyers abroad.
- (h) Provide information concerning local freight rates, tariffs, port charges, etc., so as to enable Canadian exporters to quote prices for delivery overseas.
- (i) Furnish information on the cost of travel, regulations governing commercial travellers, packaging and marking of goods, shipping accommodation, storage facilities and any special government regulations.

Financial information of the following nature may be obtained from Canadian Trade Commissioners:

- (a) Terms of credit available to foreign buyers.
- (b) Financial houses that will discount bills or extend credit.
- (c) Regulations governing the recovery of debts in foreign countries.
- (d) Disposal of goods for which buyers have contracted but are not accepted.
- (e) Infringement of trade marks or patent rights, and advice on registration.

Trade Commissioners will welcome visitors from Canada and introduce them to possible buyers or agents. They will also put visitors in touch with banking and shipping representatives, interpreters and legal advisers.

Facts Required by Trade Commissioners

Exporters should provide Canadian Trade Commissioners with the following basic information:

- (a) Catalogues and best export c.i.f. port of entry or, failing that, f.o.b. Canadian port. Prices f.o.b. factory are of little value.
- (b) Details of manufacture, if desirable.

- (c) Technical information concerning the use of products concerned, if applicable.
- (d) Bankers' references.
- (e) Elapsed time between receipt of order and probable shipment.
- (f) Quantities for which orders will be accepted.
- (g) Previous connections, if any, with agents or importers. If connections still exist, their bearing on fresh contacts made through the trade commissioner should be indicated.
- (h) Previous experience in the territory served by the trade commissioner.
- (i) Marketing methods found most successful in Canada and in other countries.
- (j) Type of agent or distributor considered to be most desirable.

Samples should not be forwarded to trade commissioners or prospective agents with the first exchange of correspondence. Regulations governing the importation of samples prevail in some countries. Heavy fines may be levied, unless these are observed, irrespective of any attempt to defraud the customs authorities, and there may be no appeal. Furthermore, in order to avoid unnecessary expense, it is advisable to await a request for samples, and instructions as to their shipment should be carefully followed.

On receipt of this information, the trade commissioner should be enabled to make a survey of his territory on behalf of the exporter, indicate the opportunities for marketing the commodities concerned, and place the exporter in touch with reliable importers or recommend suitable agents.

Information Available to Importers

Enquiries of a general character concerning the production and available supplies of raw materials and other products in foreign countries, shipping facilities and Canadian import regulations should be directed by prospective importers in this country to the Import Division, Foreign Trade Service, Department of Trade and Commerce, Ottawa. *All Canadian firms interested in importing should be listed in the Directory of Canadian Importers*, maintained by this division, from which application forms may be obtained.

More specific information required by importers should be obtained from Canadian Trade Commissioners in the territory concerned, such as:

- (a) Present and expected supply of goods.
- (b) Types and classes of goods offering.
- (c) Competitive nature of goods, with prices, terms and catalogues.
- (d) Best purchasing methods.
- (e) Report on suppliers.
- (f) Specifications and quality of goods in supply.
- (g) Basis on which sales should be made.
- (h) Definite enquiries received from exporters.
- (i) Shipping services.
- (j) Foreign government export licensing.

Influence of Geography on Import Trade

Prepared by the Import Division, Foreign Trade Service, copies of this brochure may be obtained on application to the Import Division or Trade Publicity Division, Foreign Trade Service.

Trade Commissioners can also:

- (a) Recommend responsible supply houses, manufacturers and their agents.
- (b) Assist such suppliers and provide them with information on Canadian import requirements.
- (c) Advise the best methods of approach to foreign suppliers of materials, marketing organizations, control boards, etc.
- (d) Assist in the settlement of differences that may arise between Canadian importers and firms from which goods are being purchased.
- (e) Furnish foreign supply houses or agents in their respective territories with information concerning:
 - (i) Canadian regulations and documentation governing imports into Canada.
 - (ii) Certification of documents.
 - (iii) Canadian Customs invoicing.
 - (iv) Marking, handling and general handling of products.
 - (v) Canadian Customs tariff rulings, as requested.
 - (vi) Import quotas and permits.

Financial information of the following nature may be obtained from Canadian Trade Commissioners:

- (a) Financing.
- (b) Terms of purchasing.
- (c) Basis of payments.
- (d) Exchange factors and exchange control regulations.

Importers should provide Canadian Trade Commissioners with the following basic information:

- (a) Nature of business, i.e. manufacturer, importer, etc.
- (b) Banker's and trade references.
- (c) Whether previously engaged in import trade.
- (d) Experience, if any, in the territory served by the trade commissioner, and if at present importing materials therefrom.
- (e) Specific details on materials required.
- (f) Price range to be met, and basis on which prices should be quoted.
- (g) Quantity and quality of goods required, whether these are to be purchased on a consignment or outright basis, and when these should be delivered.
- (h) Possible future requirements.

With this information at his disposal, the trade commissioner is in a position to canvass prospective suppliers, advise the Canadian importer of any response to his enquiry, and place him in touch with interested suppliers.

ABC of Canadian Export Trade

**Compiled by the Export Division, Foreign Trade Service,
copies of this publication may be obtained on application to the
King's Printer, Government Printing Bureau, for 25 cents a
copy in Canada and 50 cents abroad.**

Economy of Sierra Leone Depends Upon Agricultural Production

Substantial quantities of palm kernels, ginger, piassava, kola nuts, rubber, coffee and rice exported—Value of trade in 1945 was \$24,000,000—United Kingdom principal supplier and export market—Imports from Canada in 1945 twice pre-war value but only one-third of 1943 total.

By R. P. Bower, Commercial Secretary for Canada

(Editor's Note—This is the fifth in a series of six articles on market conditions in British West Africa prepared for *Foreign Trade*. The first four appeared in the January 24th, February 7th, February 14th and February 28th issues.)

LONDON, December 15, 1947.—Agriculture, the mainstay of Sierra Leone's economy, provides for substantial exports of palm kernels, ginger, piassava, kola nuts, rubber, coffee and rice. Mineral resources provide for shipments of haematite ore and diamonds. Freetown, the chief town and port, handles over 90 per cent of the colony's trade, which in 1945 amounted to \$24,000,000.

Situated between 5 and 10 degrees north of the equator, Sierra Leone, with an area of 27,900 square miles, is roughly the same size as Ireland. The oldest of the British West African colonies, with a population of approximately 1,768,000 people, has an annual rainfall of about 150 inches.

The Sierra Leone ten-year plan was issued in 1946, and anticipates expenditure of \$21,026,300. Details of the proposed expenditure are as follows: roads, \$1,500,000; deep-water quay (Freetown), \$2,800,000; agricultural, veterinary and fishery development, \$3,198,000; medical and health, \$4,000,000; water supplies, \$2,040,000; town planning and housing, \$1,600,000; new government offices, \$400,000; education and social welfare, \$3,700,000; and miscellaneous, \$1,468,000.

United Kingdom and United States Main Sources of Supply

Total imports into Sierra Leone in 1945 were valued at \$14,425,336, or roughly three times the value of 1938 imports. Principal suppliers in order of importance were: United Kingdom, \$8,422,084; United States, \$1,427,288; India, \$901,632; South Africa, \$867,940; Nigeria, \$740,569; Canada, \$459,420; and the Netherlands West Indies, \$436,200.

Imports from Canada in 1945, though over twice the value of imports in 1938, were only one-third of the volume reached in 1943. The figure for 1945 would unquestionably have been higher had it been possible for Canadian exporters to offer the full quantities requested. The following paragraphs indicate the principal import items:

Beer, Ale, Stout and Porter—Of 281,383 gallons valued at \$359,116, the United States supplied two-thirds, Canada one-quarter and the United Kingdom the balance.

Canned Fish—Of total imports valued at \$50,000, Canada supplied \$37,600.

Wheat Flour—The only section of West Africa to favour Canada as a source of supply for wheat flour is Sierra Leone. Out of a total of 63,000 cwt. valued at \$360,040, Canada supplied 39,312 cwt. valued at \$228,928. The United States was the only other supplier of importance. The United States has made substantial progress in this market since prewar years.

Concentrated Milk—Unsweetened condensed is the most popular type, with the United States the principal supplier. Total imports amounted in 1945 to 4,089 cwt. valued at \$71,744, of which \$66,644 came from the United States and the bulk of the remainder from Canada. In 1938, quantities and values were about half, and the United Kingdom was the principal supplier.

Spirits—South Africa supplied 9,000 of the 13,300 gallons of gin imported in 1945. The United Kingdom supplied 4,100 and Canada 176. The United Kingdom shipped 31,355 gallons of whisky and Canada 1,582, out of total imports of 33,000 gallons, valued at \$131,968.

Vegetables, Dried, Canned or Preserved—Imports amounted to 3,376 cwt. valued at \$76,000. Quantitatively, Canada was the most important supplier with 913 cwt. valued at \$12,912. The Argentine, which furnished only 431 cwt., was the leading supplier from the value viewpoint, with shipments worth \$23,800.

Boots and Shoes, Wholly or Mainly Leather—Imports amounted to 21,000 pairs valued at \$21,800. The United Kingdom was the principal supplier (7,310 pairs) followed by the United States (5,886); South Africa (2,735); Argentina (2,496); British India (1,200) and Canada (413). Canada did not share in the import of 14,630 pairs of rubber boots and shoes (including those with canvas uppers), supplies coming almost entirely from Brazil, South Africa and the United States, in the order named.

Singlets—The largest single item under the apparel heading was singlets, of which 124,658 valued at \$58,604 were imported almost entirely from the United Kingdom.

Cotton Piece-goods—Imports of cotton piece-goods were substantial, and in 1945 included 470,179 square yards of grey goods, 1,767,918 square yards of white bleached, 2,100,000 square yards of printed, 1,000,000 square yards of dyed in the piece, and 1,800,000 square yards of yarn dyed piece-goods. In every category except the first-mentioned and the last, the United Kingdom was the principal supplier. India was the largest supplier of grey goods and of yarn-dyed coloured cottons. Canada was not a supplier under any of the headings.

Mining and Gold Dredging Machinery—Imports were valued at \$233,000, almost entirely originating in the United Kingdom. The United States was the only other source.

Motor Vehicles—Thirty commercial vehicles were imported during the year, of which 24 came from the United Kingdom valued at \$40,800, five from the United States valued at \$6,220, and one from Canada (\$3,000).

Parts for commercial vehicles were valued at \$50,000 for 1945, and came largely from the United Kingdom and the United States.

Nineteen private cars were imported, sixteen from the United Kingdom and one each from Canada, Italy and the United States. Total value was \$24,000.

Cement—Imports of cement in 1945 amounted to 12,411 tons, valued at \$319,000, all originating in the United States.

Principal Exports of Sierra Leone

| | 1938 | | 1945 | |
|------------------|------------------|------------------|-----------|------------------|
| | Quantity | Value \$1,000 | Quantity | Value \$1,000 |
| Diamonds ..... | ..... | 3,432.0 | ..... | ..... |
| Ginger | Pounds 6,059,200 | 242.0 | 3,223,527 | 294.0 |
| Gold | Fine ozs. 31,505 | 832.0 | 398 | 10.4 |
| Iron ore ..... | ..... | 2,586.0 | ..... | 2,887.0 |
| Other ores | Tons ..... | ..... | 11,595 | 200.0 |

Principal Exports of Sierra Leone—Concluded

| | | 1938 | | 1945 | |
|-----------------------------------|---------|----------|-----------|----------|-----------|
| | | Quantity | Value | Quantity | Value |
| | | 1938 | \$1,000 | 1945 | \$1,000 |
| Kola nuts | Centals | 32,470 | 118.0 | 22,838 | 181.0 |
| Palm kernels | Tons | 63,697 | 1,828.0 | 47,341 | 2,506.0 |
| Palm oil | Tons | 1,066 | 64.0 | 11 | 1.7 |
| Piassava | Tons | 3,791 | 161.0 | 1,110 | 176.0 |
| Rice | Cwt. | 7,109 | 11.6 | 16,219 | 50.6 |
| Rubber | Lbs. | .... | .... | 244,239 | 66.0 |
| Total, including re-exports | | | \$9,556.0 | | \$7,148.0 |

The apparent decline in exports results from the absence of a figure for diamond exports in 1945.

The United Kingdom was the principal market in 1945 (\$6,000,000), followed by British West Africa (\$440,000), the United States (\$362,000), and foreign West African possessions (\$536,000).

Newfoundland to Supply Herring for United States Zone of Germany

Purchased under contract with Newfoundland Fisheries Board by United States Procurement Authorities, 45,000,000 pounds of herring valued at \$2,700,000 to be shipped—Government assisting by granting full drawback of duty on necessary package imports.

By J. C. Britton, Commercial Secretary for Canada

ST. JOHN'S, February 17, 1948.—Newfoundland has undertaken to supply 45,000,000 pounds of herring to United States Procurement Authorities, according to an announcement by the chairman of the Newfoundland Fisheries Board. The value of the contract is approximately \$2,700,000, and the herring will be shipped to the United States zone in Germany. It was also indicated that, if the full quantity is secured, there is a possibility of a repeat order being obtained.

The type of herring to be provided includes hard-cured split herring and hard-cured gibbed herring packed in accordance with Newfoundland Fisheries Board Regulations. The contract period is from January 1 to June 15 of the present year. As the contract calls for a quantity of 200,000 barrels, each containing 225 pounds net weight, the combined efforts of the industry will be needed to fill it. The herring catch, up to the present, has not been up to expectations.

In order to assist the industry, the government has agreed to grant 100 per cent drawback of the duty on re-export under the Newfoundland tariff with respect to packages which may have to be imported to complete the contract. The chairman of the Fisheries Board indicated that in addition to regular herring barrels provided for under the Fisheries Board regulations, other packages might be used, including tierces, pork and beef barrels.

There is a slight difference in the method of payment under the new contract to that employed for previous UNRRA and relief shipments in that credits on this occasion will not be established in Newfoundland. The United States Army Procurement Authorities will, on receipt of invoices covering shipments from the Newfoundland Fisheries Board, immediately issue a cheque on the United States Treasury for the amount of the invoice. Both invoice and cheque will be airmailed, so that there should be a minimum of delay in settling accounts.

Imports Into Malta from Canada Are Chiefly Wheat and Flour

Of total imports in first quarter of 1947 valued at £2,974,673, Canada's share was £212,530—Wheat and flour accounted for £198,473—Proximity to the United Kingdom and other factors tend to direct purchases to that source of supply—As in the United Kingdom, import restrictions have been adopted in Malta.

ROME, January 16, 1948—(FTS)—Malta purchased from Canada goods valued at £212,530 during the first quarter of 1947, imports of wheat and flour accounting for £198,473 of the total. A variety of other commodities originated in Canada, as listed below. Foodstuffs were obtained principally from countries in the Mediterranean area, Great Britain, Holland and Denmark.

Trade returns for the first quarter of 1947 indicate that total imports were valued at £2,974,673 and exports at £242,592, which leaves an unfavourable balance of £2,732,081. Figures for the corresponding period in 1946 were £2,985,151 for imports and £141,727 for exports.

Proximity to the source of supply, dollar restrictions and preferential tariffs are undoubtedly the main reason why the great majority of manufactured articles imported into Malta during the period under review come from the United Kingdom. Manufactured articles not supplied by the United Kingdom came mostly from Italy, Belgium and Czechoslovakia, in that order, and not from hard-currency countries.

Preferential Tariffs Affect Imports

The following table illustrates the influence of the preferential tariff, where it is applicable, on the Maltese situation:

| | Imports from Preferred Countries | Imports from Non-preferred Countries |
|--|--|--|
| Food, drink and tobacco | £ 108,902 | £ 129,320 |
| Raw materials and unmanufactured articles..... | 8,799 | 87 |
| Articles wholly or mainly manufactured | 1,059,475 | 227,444 |
| Miscellaneous | 112 | 535 |
| Total | £1,117,288 | £ 357,386 |

Although the total value of exports from Malta in the period January-March, 1947, is £242,592, only £53,901 was domestic produce. The difference is accounted for by the re-export of ship's stores.

Exports Principally to the United Kingdom

Smokers requisites (£15,385) destined for the United Kingdom; table potatoes (£1,265) for India; hide and skins (£8,167) for the United Kingdom, Italy and Turkey; lace (£8,081) for the United Kingdom; corks (£2,118) for Palestine; and gloves (£1,670) for the United Kingdom account for most of the export value.

Like all other colonial possessions within the sterling area, Malta is adhering to the same austere restrictions as the United Kingdom with respect to all imports, especially those from the dollar area. After a temporary postwar relaxation, import licensing has since been reimposed on all goods from whatever source they are arriving. The licensing system is at least as strict as that in force at the height of the war. It should

be borne in mind, therefore, that import licences will at present be granted only for restricted quantities of essential goods. However, in order that they may be in a position to take advantage of trade opportunities afforded when trade with Malta is freer, Canadian exporters should establish contacts in Malta now.

Wheat Main Import from Canada

Following is a list of imports into Malta from Canada during the first quarter of 1947:

Imports into Malta from Canada, January-March, 1947

| | |
|--|----------|
| Wheat | £196,136 |
| Flour | 2,337 |
| Meat, bacon, ham and sausages | 4,778 |
| Tinned meat | 1,245 |
| Whisky | 1,025 |
| Chemicals and apothecaries wares | 282 |
| Clocks and watches | 91 |
| Electrical goods | 103 |
| Leather (tanned) | 2,073 |
| Hardware | 106 |
| Motor cars | 2,670 |
| Chassis of automobiles | 2,829 |
| Motor car accessories | 1,665 |

Census of Industry in South Africa Indicates Higher Production Level

Preliminary report for 1944-45 covers 10,877 industrial establishments—General increase recorded for production value, number of employees and wages paid—Details of output by private industry supplied.

By J. H. English, Commercial Counsellor for Canada

JOHANNESBURG, December 1, 1947.—The gross value of South African industrial production in 1944-45 totalled £375,344,000 as compared with £330,557,000 in 1943-44 and £199,617,000 in 1938-39. The numbers of employed persons in these years were 488,661 in 1944-45, 451,176 in 1943-44 and 352,500 in 1938-39, and wages paid in the respective periods were £94,222,000, £80,082,000 and £46,079,000.

The foregoing figures are from a recently issued preliminary report of the twenty-eighth industrial census of South Africa, which covers 10,877 industrial establishments (mining and quarrying excluded) having a fixed capital of £170,114,000 and employing 488,661 persons, of whom 165,519 are European.

Municipal and government concerns accounted for £34,179,000 of the total output of £375,344,000 in 1944-45.

The following table shows the relative industrial importance of each province in 1944-45 (private industry only) and the comparative sizes of separate classes of private industry in South Africa:

Private Industry, by Provinces, in 1944-45

| | No. of establishments | No. of employees | Gross value of output |
|-------------------------|-----------------------|------------------|-----------------------|
| Cape Province | 3,665 | 124,897 | £ 98,835,000 |
| Natal | 1,521 | 76,415 | 67,074,000 |
| Transvaal | 4,378 | 217,949 | 165,579,000 |
| Orange Free State | 841 | 12,141 | 9,677,000 |

Classes of Private Industry in 1944-45

| | No. of establish- ments | Fixed capital £1,000 | Employees | Gross value of output, £1,000 |
|-----------------------------|-------------------------------|----------------------------|-----------|-------------------------------------|
| Raw materials | 66 | 768 | 3,105 | 5,112 |
| Stone, clay, etc. | 505 | 6,362 | 34,092 | 11,712 |
| Wood | 592 | 2,907 | 23,627 | 10,538 |
| Metals | 1,291 | 27,199 | 104,106 | 63,300 |
| Food and drink | 2,116 | 20,655 | 71,821 | 94,391 |
| Clothing and textiles ... | 1,198 | 6,576 | 45,792 | 31,988 |
| Printing | 479 | 6,272 | 15,138 | 12,850 |
| Vehicles | 1,736 | 4,502 | 17,002 | 9,125 |
| Ships and boats | 14 | 93 | 3,180 | 1,233 |
| Furniture | 434 | 2,542 | 11,561 | 8,214 |
| Chemicals | 299 | 8,533 | 24,036 | 31,421 |
| Surgical instruments | 36 | 135 | 385 | 241 |
| Jewellery | 95 | 288 | 1,339 | 3,731 |
| Heat, light and power ... | 127 | 40,432 | 12,439 | 15,729 |
| Leather | 401 | 2,692 | 21,996 | 17,016 |
| Building and contracting .. | 871 | 1,790 | 34,816 | 15,895 |
| Other industries | 145 | 1,685 | 6,967 | 8,669 |

External Trade of India Shows Increase on Basis of Values

Jute, jute manufactures and tea contribute substantially to export rise, while inflow of capital goods partially responsible for advance in import totals—Upward trend in prices prevents any accurate analysis — Rail transportation deteriorates—Production of jute increases.

By Richard Grew, Commercial Secretary for Canada

(Editor's Note—This is the second in a series of three articles on current economic conditions in India prepared for publication in *Foreign Trade*. The first appeared in the February 21st issue.)

BOMBAY, December 24, 1947.—Jute, jute manufactures and tea contributed to a substantial increase in the value of exports from India since December, 1946, while capital goods accounted in part for an advance in the value of imports. The advance in the value of capital goods, which represent only a small percentage of the total imports, is attributed largely to higher prices charged by the exporting countries, principally the United States and Great Britain. While these have risen rapidly in the last eighteen months, in sharp contrast to the period of strict control during the war, it is not possible to furnish information at present on advances registered by individual items.

The general postwar increase in prices for goods of all kinds imported by this country prevents any accurate analysis of trade returns, and renders the terms of trade unfavourable to India. As a result, this country has had to increase its exports to pay for a constant volume of imports. Between September, 1945, and December, 1946, the price of the average consignment of imports rose by 64 points, while the price obtained by India for its average shipment of goods rose by only 32 points. The statistical measure of the so-called barter terms of trade is the relation of one category of prices to the other. An indication of the recent deterioration of this position is noted in the terms of trade for 1946, which are lower by 15 per cent than in 1945.

Statistics pertaining to the foreign trade of India are not yet available for last July and August, but those of May and June indicate a measure of expansion. Imports during the four months ending in June



India—Bombay, showing the “Gateway of India” and the Taj Mahal Hotel. Much of the external trade of this vast country is handled through the port of Bombay.

were valued at Rs.321,900,000, which represents an increase of approximately Rs.28,900,000 over imports for the previous period. Exports in the four months ending last June were valued at Rs.316,200,000, which is an increase of Rs.16,800,000 over the value of exports for the previous four-month period. Import and export values for the twelve months ending in June, compared with those for August, 1939, are set forth in the following table:

External Trade of India

| | Imports | Exports | Trade balance |
|--------------------|-------------------|------------|---------------|
| | (Thousand rupees) | | |
| August—1939 | Rs.138,600 | Rs.164,000 | Rs. 25,400 |
| July—1946 | 217,500 | 237,300 | 19,800 |
| August | 190,300 | 211,200 | 20,900 |
| September | 263,500 | 199,700 | — 63,800 |
| October | 256,900 | 258,100 | 1,200 |
| November | 278,400 | 252,700 | — 25,700 |
| December | 303,900 | 329,900 | 26,000 |
| January—1947 | 290,600 | 363,800 | 73,200 |
| February | 299,100 | 251,400 | — 47,700 |
| March | 299,300 | 304,100 | 4,800 |
| April | 324,900 | 256,900 | — 68,000 |
| May | 325,800 | 356,500 | 30,700 |
| June | 337,100 | 347,300 | 10,200 |

Rail Transportation Deteriorated

Rail transportation, which is vital to the economic system of a territory the size of India, has deteriorated from month to month over the past two years, although there has been no decline in the number of freight cars or goods wagons in service. The decline in the movement of freight is attributed to a reduction in the amount of effort displayed, a condition that is spreading over an ever-increasing area, though seasonal factors influenced the situation during the four months ending last August. The only redeeming feature was the fact that the movement of food grains and coal was affected to a lesser extent than that of miscellaneous industrial and agricultural products.

The number of wagons loaded on Class I railways declined from a monthly average of 564,000 to 527,000 in June. The average amount of freight raised per month during the quarter ended in August was 6,800,000 tons, compared with 7,300,000 tons in the previous four-month period and with 7,200,000 tons in the corresponding period of 1946. The movement of food grains and coal during the four months ending last August represented a drop of five per cent from that in the corresponding period of 1946.

Production of Jute Improved

The jute mill industry of Bengal regained during the period under review (May to August, 1947) some of the ground lost in the previous months. Production in July totalled 91,000 tons, compared with an average for the preceding period of 77,000 tons. Delayed arrivals of raw jute from the East and inadequate deliveries of coal resulted in a decline of 10,000 tons in production last August.

In Bombay province, which accounts for sixty per cent of the cotton textile production of India and Pakistan, the latest information indicates some deterioration in output from a level that was already low. Monthly production of piece-goods in the quarter ended last August was approximately 200,000,000 yards, or about 1.8 per cent lower than in the preceding period. Production of cloth in the first eight months of 1947, amounting to 1,602 million yards, shows a reduction of 7 per cent from the corresponding period in 1946 and of 18 per cent from the corresponding period in 1945.

Production of Steel Declined

Production of finished steel, which showed a slight improvement during the first four months of 1947, following the settlement of a labour dispute, declined again in subsequent months. The monthly average for the period under review was 35,000 tons, compared with 39,000 tons in the previous period and 40,000 tons in the corresponding period of 1946. This reduction, during a period of acute general shortage, has resulted in a 50 per cent cut in provincial quotas for the second half of the year. Production of cement, on the other hand, has increased substantially in recent months. Consumption of electricity by industrial establishments amounted to 178,500,000 kwh. per month in the quarter ended last August, compared with 176,800,000 kwh. in the preceding period.

New Zealand Invites Tenders for Electrical Equipment

The New Zealand State Hydro-Electric Department, Wellington, New Zealand, invites tenders for the following equipment:

- 1—50,000 KVA 110/22 kv T.C.O.L. Transformer Bank and Spare Units for Penrose Substation; Contract No. 86, Section 45, Auckland.
- 3—30,000 kva 22 kv Voltage Regulating Transformers for Penrose Substation; Contract No. 87, Section 46, Auckland.
- 1—22 kv Current Limiting Reactor for Penrose Substation; Contract No. 88, Section 47, Auckland.

The tenders close with the Secretary, Tenders Committee, State Hydro-Electric Department, Wellington, New Zealand, on June 15, 1948. Interested Canadian firms may obtain further particulars and specifications from J. A. Malcolm, New Zealand Government Trade Commissioner, Sun Life Building, Montreal.

United States Harvested Higher Acreage, But Had Lower Yield

Farmers' total income of \$30,340,000 reflected higher prices for their products—Wheat production exceeded a billion bushels for the fourth consecutive year—Corn crop smallest since drought year 1936—Cotton production below ten-year average.

By W. D. Wallace, Assistant Commercial Secretary, Canadian Embassy

(Editor's Note—This is the second of a series of articles on economic conditions in the United States, prepared for publication in *Foreign Trade*. The first was published in the February 28th issue.)

WASHINGTON, February 9, 1948.—Agricultural production in the United States during the past year was slightly below the average for the best five years in the country's history, and was exceeded only by that for 1942, 1944 and 1946. The acreage harvested was about one per cent greater than in 1946, but the yields per acre were lower. Farmers have had little opportunity to relax since the war period, due to a continuing emergency. As a result of the heavy demands for food, feed and oil seeds, prices have increased for farm products, thereby providing an incentive to put forward their best efforts.

Farmers derived a total income of \$30,340 million during 1947, compared with \$25,320 million in the preceding year, according to an estimate of the Bureau of Agricultural Economics, which represents an increase of 20 per cent. The higher income reflected an advance in prices, as the physical volume of marketings rose only 3 per cent. Government payments to farmers in the past year declined by 58 per cent, from \$800,000,000 to \$340,000,000. On the other hand, cash farm income continued to advance as marketing remained high and prices increased and was placed at \$30,000,000,000 as against \$24,520,000,000 in 1946. The greatest increase in cash income over the 1946 figure was from marketings of food grains, the gain being 65 per cent. Livestock receipts, at \$16,870,000,000, were 23 per cent above the 1946 returns of \$13,670,000,000.

Wheat Production Again Exceeded One Billion Bushels

According to the "Annual Summary" Crop Reporting Board of the Department of Agriculture, wheat production for the fourth consecutive year exceeded a billion bushels and established a high record of 1,364,919,000 bushels. This was 18 per cent greater than the previous record crop of 1,153,046,000 bushels in 1946 and was more than 50 per cent larger than the 1936-45 average of 890,306,000 bushels. Total area for all wheat harvested in 1947 amounted to 74,186,000 acres as against 67,075,000 acres in the previous year, an increase of 16 per cent, and was 30 per cent over the ten-year average of 57,036,000 acres.

The past year was an outstanding winter-wheat year, with a record high harvested acreage. Production in 1947 amounted to 1,067,970,000 bushels, the first winter-wheat crop to top the billion-bushel mark, and was 22 per cent over the 1946 crop of 870,725,000 bushels. The area of winter wheat harvested totalled 54,780,000 acres as against 48,350,000 acres in the previous year. The yield was 19.5 bushels per acre as compared with 18 bushels in 1946.

Spring Wheat Crop 25 Per Cent Above Average

Spring-wheat production, estimated at 296,949,000 bushels, was 5 per cent above the 1946 crop of 282,321,000 bushels but only one-fourth larger than the 1936-45 average of 236,413,000 bushels. The area harvested was 19,406,000 acres as compared with 18,725,000 acres in 1946 and the ten-year average of 16,353,000 acres. The yield of spring wheat was placed at 15.3 bushels per acre as against 15.1 bushels in the previous year and the 1936-45 average of 14.4 bushels per acre.

Durum wheat production accounted for 43,983,000 bushels of the total for spring wheat and was 8,147,000 bushels in excess of the 1946 total of 35,836,000 bushels. The estimated 2,925,000 acres of durum wheat harvested is 19 per cent above both the 1946 total of 2,453,000 acres and the 1936-45 average of 2,458,000 acres. The yield of durum wheat amounted to 15 bushels per acre as compared with 14.6 bushels in 1946 and the ten-year average of 13.1 bushels per acre.

Despite heavy disappearance of the record 1947 wheat crop, wheat stocks on farms on January 1, 1948, at 427,620,000 bushels, were the second largest on record for the date, being exceeded only in 1943. The stocks on January 1, 1947, amounted to 365,794,000 bushels, while the 1937-46 average is 310,518,000 bushels.

Corn Crop Smallest Since 1936

As a result of adverse conditions in 1947, the corn crop was the smallest since the drought year 1936. The crop was placed at 2,400,952,000 bushels, or 26 per cent below the 1946 record crop of 3,249,950,000 bushels and 9 per cent below the 1936-45 average of 2,639,102,000 bushels. The 1947 crop was harvested from 83,981,000 acres, or 5 per cent less than the 88,489,000 acres in the previous year and 7 per cent below the 1936-45 average of 90,083,000 acres. The yield per acre amounted to 28.6 bushels, the lowest since 1938, and was 8.1 bushels below the 1946 yield of 36.7 bushels but only about one bushel under the 1936-45 average of 29.4 bushels per acre.

Stocks of corn on farms on January 1, 1948, amounted to 1,517,901,000 bushels, the smallest January 1 stocks since 1937, as compared with 2,136,640,000 bushels on January 1, 1947. This was a decrease of 619,000,000 bushels, or 29 per cent, and was 16 per cent, or 294,000,000 bushels, below the ten-year average of 1,811,738,000 bushels.

Production of Cotton Below Average

As of December 1, 1947, the cotton crop was estimated at 11,694,000 bales of 500 pounds, which is about 3,000,000 bales above last year's exceptionally low figure but 700,000 bales below the ten-year average. By the above date, 10,043,000 running bales, or 88 per cent of the crop, had been ginned; a year ago ginnings totalled 7,368,000 bales, or 86.5 per cent of the crop.

Protection from moisture, especially for goods going to, or passing through, tropical zones of high humidity, requires waterproofing lining of cases, or with iron and steel goods the use of a slush covering which should not run at high temperatures, but which can be removed without too much difficulty. (*See our ABC of Canadian Export Trade, page 19.*)

Malayan Dollar-Earning Capacity Invaluable to Sterling Economy

Exports of rubber, tin, oils, sago and other indigenous products well in excess of purchases of foodstuffs, fuel oil, iron and steel, machinery and vehicles—Canada now third best customer.

By Paul Sykes, Canadian Trade Commissioner

(Editor's Note—This is the third of four articles pertaining to Singapore and the Federation of Malaya, both as a market and source of supply. The first two appeared in the January 24th and February 7th issues of *Foreign Trade*.)

SINGAPORE, February 2, 1948.—Foreign trade statistics of Singapore and the Federation of Malaya are compiled in a central office and apply to both colonies as a single unit, though they are separate political entities. The largest proportion of the imports and exports flow through Singapore, though Penang and Port Swettenham share in the trade. The movement through other ports is very limited.

Malaya is, traditionally, a creditor country, so far as foreign trade is concerned. Exports of rubber, tin, oils, sago and other indigenous products, apart from those represented by transshipments, have generally been well in excess of the value of purchases for consumption of foodstuffs, fuel oil, iron and steel, machinery, vehicles, etc. This dollar-earning capacity is invaluable at the present time to the sterling economy.

It is difficult to provide a detailed statistical picture of Malaya's foreign trade as compared with prewar years, since official statistics are only available for a part of 1947. Several tables given in this article may nevertheless be of value as showing the main features of prewar import and export business by countries and principal commodities and the principal changes which have featured the trade since the war.

In considering the trade tables, it must be borne in mind that 1947 data are mainly based on commodity values which probably vary from 200 to 300 per cent in excess of those of prewar years. As no complete or accurate records of unit prices are available, a close comparison of the physical volume of the business cannot be supplied. It is still obvious that Malaya has already gone a long way on the road to recovery as a trading area. As Singapore's capacity to handle large business from and to the Netherlands Indies and the Far East can be put to advantage, further evidence of progress will be available.

Tables do not correspond precisely with regard to commodity or group definitions, but it is believed that these are sufficiently clear to give a fair picture of the composition and extent of current overseas trade as compared with the last complete year before the war.

Canada is Third Best Customer

In the two tables following, Malaya's export and import trade is summarized on a basis of the ten principal countries involved for the year 1938 and for January-June, 1947. In the case of exports, apart from the elimination of Japan and the retention of the United States and the United Kingdom as the principal outlets for the sale of rubber, tin and other local produce, it is interesting to note that Canada is now Malaya's third best customer. Germany and Italy have reappeared as substantial consumers of various of Malaya's exports. Australia currently occupies a much less important position as a buyer of Malayan goods than in prewar times.

Exports from Malaya, by Principal Countries

(In thousands of Straits Dollars)

| Countries | 1938 | Countries | Jan.-June, 1947 |
|-----------------------|------------|-----------------------|-----------------|
| United States | S\$172,763 | United States | S\$196,407 |
| United Kingdom | 82,072 | United Kingdom | 109,395 |
| Japan | 53,887 | Canada | 33,383 |
| Germany | 43,523 | Sumatra | 32,898 |
| Australia | 26,696 | India | 28,211 |
| Sumatra | 22,979 | Argentina | 26,614 |
| India | 21,269 | Hongkong | 25,960 |
| Italy | 18,643 | Germany | 21,035 |
| Greece | 18,212 | Italy | 17,858 |
| Canada | 17,591 | Java | 15,667 |
| Siam | 15,704 | Australia | 12,734 |
| Java | 9,845 | Russia | 11,267 |
| Other Countries | 76,465 | Other Countries | 123,634 |
| Total | \$579,649 | Total | S\$655,063 |

Imports into Malaya, by Principal Countries

(In thousands of Straits Dollars)

| Countries | 1938 | Countries | Jan.-June, 1947 |
|-------------------------|------------|-----------------------|-----------------|
| Sumatra | S\$110,625 | United Kingdom | S\$120,832 |
| United Kingdom | 102,332 | Sumatra | 95,863 |
| Siam | 87,881 | China | 72,955 |
| Burma | 25,146 | Siam | 67,819 |
| Sarawak | 24,125 | United States | 51,599 |
| China | 23,920 | Australia | 42,623 |
| Java | 18,133 | Hongkong | 34,254 |
| United States | 17,125 | Sarawak | 23,767 |
| Borneo | 17,067 | India | 21,944 |
| India | 16,259 | Burma | 16,347 |
| French Indo-China | 14,711 | Riouw Presy. | 13,707 |
| Australia | 13,084 | Java | 13,527 |
| Other Countries | 84,585 | Other Countries | 113,839 |
| Total | S\$554,993 | Total | S\$689,076 |

Exports from Malaya, by Principal Groups of Commodities

(In thousands of Straits Dollars)

| Commodities | 1938 | Commodities | Jan.-June, 1947 |
|----------------------------|------------|--------------------------|-----------------|
| Rubber | S\$277,954 | Rubber | S\$429,947 |
| Non-ferrous metals | 96,645 | Tin | 39,557 |
| (mainly tin) | | Cotton piece-goods | 16,546 |
| Oils, fats, etc. | 57,224 | Pepper | 13,988 |
| Miscellaneous food .. | | Coconut oil | 10,900 |
| and drink | 36,971 | Petroleum | 10,731 |
| Oil seeds, etc. | 27,453 | Arecanuts | 10,147 |
| Grain and flour | 19,139 | Sago | 9,702 |
| Iron ore | 7,477 | Palm oil | 8,158 |
| Cotton yarn and mfrs. | 6,059 | Cigarettes | 5,804 |
| Non-ferrous ores | 5,694 | Other commodities | 99,583 |
| Vehicles and vessels | 4,453 | | |
| Other commodities | 40,580 | | |
| Total | S\$579,649 | Total | S\$655,063 |

Imports into Malaya, by Principal Groups of Commodities

(In thousands of Straits Dollars)

| Commodities | 1938 | Commodities | Jan.-June, 1947 |
|----------------------------|------------|--------------------------|-----------------|
| Oils | S\$ 86,026 | Rubber | S\$107,628 |
| Rubber | 76,867 | Cotton piece goods | 87,879 |
| Grain and flour | 71,140 | Rice | 33,060 |
| Miscellaneous food .. | | Petroleum | 29,826 |
| and drink | 64,270 | Flour | 26,582 |
| Non-ferrous ore | 30,211 | Cigarettes | 23,985 |
| Cotton yarn and mfrs. | 25,940 | Sugar | 15,408 |
| Drink and tobacco | 23,371 | Tinned milk | 9,832 |
| Iron and steel goods | 22,673 | Coal | 7,861 |
| Machinery | 21,026 | Sago | 6,943 |
| Vehicles and ships | 15,389 | Other commodities | 340,072 |
| Other commodities | 118,080 | | |
| Total | S\$554,993 | Total | S\$689,076 |

Controls Have Changed Import Situation

The import situation has changed more noticeably as a result of controls, the availability of local requirements and several similar factors. China, United States, Australia and Hong Kong have improved their position as sources of supply of imports for consumption or transshipment, while that of Burma, French Indo-China and Java has fallen off owing to lack of materials, mainly rice, for export.

The record of Malaya's prewar and current export trade by principal commodities reveals a reasonable maintenance in rubber shipments, but a heavy falling-off in those of tin consequent on the serious wartime damage to mining equipment. The re-establishment of transshipment trade is clearly revealed by the large export values in 1947 for textiles, pepper and cigarettes, none of which are produced in either of the two colonies.

Import statistics for 1947, as compared with those of 1938, evidence the extent of postwar demand for cotton cloth, flour as a substitute for unobtainable rice supplies, sugar, tinned milk and coal. There have also, of course, been substantial imports of vehicles, machinery and other goods which figured in prewar trade. In various of these instances, however, supplies have been difficult to obtain and the re-emergence of such items among principal commodity imports cannot be expected for some time.

Malaya Has Favourable Trade Balance with Canada

Malaya's trade with Canada has traditionally been characterized by a large favourable balance. The Canadian demand for rubber, tin, oils and canned pineapple used to be far in excess of local requirements for such Canadian exports as motor vehicles, parts and tires; canned and other foodstuffs such as evaporated milk, milk powder and canned fish; newsprint and other papers; building board and boxboard containers; pens, pencils and a variety of electrical equipment. In 1938, for example, Malaya's imports from Canada were valued at \$4,960,354, while exports to Canada reached a figure of \$17,590,783.

The situation at the present time which has, of course, only reached a partial degree of stabilization, still shows a large balance in Malaya's favour, imports having been valued at \$10,530,927 in January-June, 1947, as compared with a value for exports of \$33,382,669.

The trade has at the same time undergone various alterations in composition, but several of these factors are of temporary duration only. Exports to Canada continue to be made up mainly of crude rubber and tin, but also comprise fairly substantial amounts of rubber manufactures, latex, sago and tapioca, pepper and various gums and spices. The export of canned pineapple has, however, fallen off completely and is not likely to be resumed for some time.

In the case of imports, recent figures show a large increase in the trade in foodstuffs, which is due mainly to government-controlled purchases of flour, but has also included canned fish, canned fruits and vegetables, milk foods, rolled oats, whisky, beer and various allied commodities. The trade in manufactured goods has, however, shown no similar tendency. Its present composition, as in prewar years, is based largely on motor vehicle imports, supplemented by those of parts, tires, some machinery and electrical equipment, pens and pencils, newsprint paper and several chemicals.

The following tables, although only in condensed form, illustrate the basic composition and extent of Malayan-Canadian trade in 1938 and January-June, 1947:

Exports from Malaya to Canada, by Main Groups

| (In thousands of Straits Dollars) | | |
|---------------------------------------|-----------|-----------------|
| Groups | 1938 | Jan.-June, 1947 |
| Animals, food, drink and tobacco..... | S\$ 975 | S\$ 142 |
| Raw and unmanufactured materials..... | 14,149 | 27,261 |
| Manufactured products..... | 2,467 | 5,980 |
| Total | S\$17,591 | S\$33,383 |

Imports into Malaya from Canada, by Main Groups

| (In thousands of Straits Dollars) | | |
|---------------------------------------|----------|-----------------|
| Groups | 1938 | Jan.-June, 1947 |
| Raw and unmanufactured material | 5 | ..... |
| Manufactured products | 4,317 | 3,513 |
| Total | S\$4,960 | S\$10,530 |

Transportation System in Angola Being Extended, But Still Short of Needs

Provision of secondary ports may be necessary if coastwise traffic continues present increase—Financial condition of colony considered sound—Balance of trade steadily improving.

By Trade Commissioner Service, Foreign Trade Service

(Editor's Note—This is the third in a series of articles prepared for *Foreign Trade* on economic conditions in Angola. The first two appeared in the January 31st and February 28th issues.)

(One angolar equals one Portuguese escudo; 1,000 angolares equal one conto, which is equivalent to \$40.40 Canadian)

HIGHWAYS in Angola, which had an aggregate length in 1946 of 37,000 kilometres, are being extended. Asphalt roads were then under construction between Luanda and South Angola, and from Lobito to Benguela, with another to Dondo. Railway trackage totals 2,376 kilometres, and negotiations have been carried on for some time with the Government of Northern Rhodesia for the improvement of transportation facilities between the two territories.

According to figures available for 1945, harbour traffic for the colony totalled 2,287,000 tons, of which 767,000 tons were handled through Lobito and 667,000 tons through Luanda. More foreign vessels docked in ports of Angola during 1946, but the tonnage of outgoing merchandise showed a decrease. Coastwise shipping traffic has been increasing steadily, however, and it will be necessary to provide secondary ports if this condition continues. Merchandise has been deteriorating on rafts and in warehouses, due to the shortage of transportation facilities, but funds were provided by the Development Board in 1947 to fill the most urgent requirements.

There has been a gradual increase in the traffic handled by airways in Angola since 1940. Passengers carried by aircraft in that year totalled 543, compared with 3,001 in 1945. Air freight increased from 306 kilograms to 6,991 kilograms, while the amount of mail flown rose from 651 kilograms to 5,270 kilograms.

Financial Condition of the Colony Sound

The financial condition of the colony is sound, as indicated by the figures set forth below, ordinary receipts showing increases over those for preceding fiscal years and extraordinary receipts exceeding the bud-

getary estimates. Ordinary expenditures were lower than in the preceding year, and extraordinary expenditures were mainly for the development of Angola.

Financial Situation

| | 1945 | 1946 |
|----------------------------------|---------|---------|
| | Contos | Contos |
| Receipts, ordinary | 411,092 | 506,441 |
| Receipts, extraordinary | 49,256 | 19,433 |
| Total | 460,348 | 525,874 |
| Expenditure, ordinary | 318,724 | 239,440 |
| Expenditure, extraordinary | 40,480 | 26,665 |
| Total | 359,204 | 266,105 |

As in past years, the favourable economic situation in 1946 is due to the increase in receipts, deriving directly or indirectly from the economic progress of Angola, reflected by the constant advance in the value and volume of production; the establishment of new industries and the extension of those already in operation; the intensification of internal trade; the volume of credit operations; and, most of all, the steadily improving balance of trade.

The following comments on the Angolan fiscal system are by the well-known specialist in colonial finance, Dr. Marcelo Caetano: "Angola has an antiquated fiscal system, based predominantly on indirect taxation founded on customs duties. This form of taxation has advantages for colonies during the stage of development or when internal consumption is insignificant, capital investments small and production destined exclusively or predominantly for export. But, as the colony becomes populated by Europeans and the native acquires new habits, an improved internal market is created capable of absorbing a considerable share of domestic production, imports of consumer goods decrease, firms are established, new communities are formed, the system of taxation based on customs duties is no longer adequate and the disadvantages of indirect taxation become more and more pronounced, particularly so far as import duties are concerned."

The following enterprises, to a value of 300,000 contos, are planned for the five-year period 1946-1950, financed for the most part by loans totalling 250,000 contos from the General Deposit Bank and the Diamond Company, and bearing interest at $3\frac{1}{2}$ per cent:

Power installations, 30,000 contos; public health and welfare, 34,000 contos; communications, 138,000 contos; agricultural, forestry, fisheries and mining, 32,000 contos; subsidies to local improvements, 35,000 contos; erection of new schools and completion of work already started, including equipment, 29,000 contos; miscellaneous (personnel and development services), 2,000 contos.

Supply Position Limits Relief Shipments

Provision has been made for the expenditure of \$121,355,000 during the first three months of the current calendar year on a wide range of products required by Greece. The utilization of these funds, made available by the United States for reconstruction and relief, will be supervised by the American Mission for Aid to Greece (AMAG). Some indication of the wide variety of items required by that country is found in the list published in the February 21st issue of *Foreign Trade*. A proportion of the supplies may be provided by Canada, though the present supply position does not permit of export licences being granted for some items. This applies particularly to certain foodstuffs.

Chilean Purchases from Canada Appreciably Higher Last Year

Shipments from Canada valued at \$4,467,487 for year ending October, 1947, as compared with \$3,460,805 for the year ending October, 1946—Shortage of foreign exchange forces country to institute extreme import restrictions.

By J. L. Mutter, Commercial Secretary, Canadian Embassy

SANTIAGO, January 8, 1948.—Canadian exports to Chile during the past year were appreciably higher than in the corresponding period for the previous year. Due to delays in the publication of statistics in this country, a review of trade between Canada and Chile is based on figures issued by the Dominion Bureau of Statistics, in Ottawa, which reveal that Canadian exports for the twelve months ending last October were valued at \$4,467,487, compared with \$3,460,805 for the corresponding period ending October, 1946. The most important items were: newsprint, \$815,661; agricultural implements and parts, \$325,090; rubber belting, \$299,567; asbestos fibre, \$175,299; metal-working machinery, \$150,618; iron and steel bars, \$138,269; and electric meters, \$122,363.

The deterioration of Chile's foreign exchange position, new restrictions on imports and the activities of commercial banks, an alarming increase in the accumulated budget deficit, a continued rise in the cost of living, social unrest, which was marked by labour disputes and strikes in the country's principal industries are among the most notable economic developments during the past year.

Short supply of certain commodities in Canada militated against more satisfactory returns. The more important deterrent, however, was the extreme measures instituted in Chile to prevent the importation into the country of all but such commodities as were considered indispensable to national industry and economy. The foreign exchange position continued to deteriorate and at the year's end, the Customs ports were still clogged by merchandise for which no exchange was available. Amounts of exchange coming on to the market were applied, so far as possible, to the reduction of this congestion. Due to the many other calls on supplies, progress in this direction was discouragingly slow.

Statistics, also issued by the Dominion Bureau, show imports into Canada from Chile for the twelve-month period ended September, 1947, at Canadian \$459,822, or little more than 10 per cent of the export figure, as compared with Canadian \$374,417 for the year ending September, 1946. The principal items were: crude iodine, \$170,570; sheepskins, \$105,613; fresh grapes, \$36,369; nitrates, \$32,817; beeswax, \$17,051; onions, \$15,619; and honey, \$11,208.

United States Exporter Has Major Share of Market at Present

Under the present conditions of restricted imports, the United States exporter undoubtedly commands a major share through operations financed by the Export-Import Bank of purchases made by the Chilean Development Corporation (Corporación de Fomento de la Producción), State Railways and other official or semi-official institutions. The State Railways are presently making important purchases in the United States by means of a loan carrying the guarantee of the Chilean Government. Canadian manufacturers have on occasion been asked to quote, but have not been prepared to grant the long-term credit facilities stipulated by buyers.

Figures recently released by the Customs Department indicate that imports during January to October, 1947, amounted to 1,560,657 metric tons valued at 1,040,786,522 pesos of 6d. gold. During the same period in 1946, imports were 1,427,000 tons with an estimated value of 746,900,000 gold pesos.

Chile's exports during the first ten months of the year amounted to 3,565,752 tons with a value of 1,094,434,491 gold pesos compared with 2,917,900 tons with an estimated value of 932,000,000 gold pesos.

Mineral Production Increased in Past Year

During the months January-October inclusive, the general index of Chile's mineral production was 103.2 as against 92.3 for the same period in 1946 (base 1927-29=100). In the first ten months of the year copper production totalled 356,000 metric tons compared with 308,000 tons in 1946. Nitrate production was 1,341,000 tons against 1,331,000 in the corresponding period of 1946. Coal production rose from 1,612,000 tons in 1946 to 1,702,000 in 1947. Iron ore production continued to increase, the output for the ten month ending October, 1947, being 1,491,501 tons, in contrast with 1,158,386 tons for the whole of 1946.

A number of increases were returned for the crop year 1946-47 and may be itemized as follows: barley, up by 238,000 quintals over the 1945-46 crop of 75,031 metric tons; beans, 130,000 quintals above the previous year crop of 73,055 tons; lentils, an increase of 60,000 quintals over the 1945-46 figure of 16,985 tons; maize, 35,000 quintals better than the 1946 crop of 64,541 tons.

Other important crops, however, recorded smaller fields than in 1945-46, notably potatoes, which were 900,000 quintals less than the previous year's crop of 708,673 metric tons; rice, 300,000 quintals below the 1946 figure of 117,941 tons; oats, 140,000 quintals less than the 1946 crop of 84,002 tons; and wheat, 300,000 quintals below the previous crop of 930,139 tons.

Sowings of wheat, barley, oats and rye have been more extensive during the current crop year, and there has been greater interest in field crops, according to the latest figures available, due to the more attractive prices ruling at the moment.

The cattle population of the Republic in 1947 was estimated at 2,337,674, a slight decrease below the 1946 estimate of 2,397,346.

The average general index of industrial production for the ten months, January-October, 1947, was 211 compared with 200 for the same period in 1946 (base 1927-29=100). The principal increases recorded occurred in the cement industry and the manufacture of glass, tar, matches, wool, cloth, paper and cardboard, footwear, refined sugar, beer and tobacco products.

The value of building construction permits granted during the eleven-month period, January-November, 1947, was 1,248 millions pesos, a decrease of 362 million pesos below the corresponding figure for 1946. A notable feature during the year has been the suspension of activity on a number of building projects, due to the restriction of bank credit, rising costs and the shortage of imported building materials.

Chile Active in International Commercial Relations

A Chilean delegation attended the International Conference on Trade and Employment at Geneva. As the year ended, it was announced that at the Conference, Chile had signed agreements with Cuba, Czechoslovakia, France, India, Syria and the Lebanon, New Zealand, Norway, South Africa,

United Kingdom, United States, Australia, Benelux (Belgium-Netherlands-Luxemburg Union), Brazil and Canada.

Otherwise, the Chilean Government has entered into, or renewed, the following commercial agreements since December, 1946: *modus vivendi* with Belgium; commercial agreement—Venezuela; commercial agreement—Czechoslovakia; provisional commercial agreement—Great Britain and Northern Ireland; commercial agreement—Holland; commercial agreement—Ecuador; and provisional commercial agreement—United States.

Chile's proposed trade and loan agreement with Argentina was approved by congress before the year ended, but at this date has not yet received senate approval. Arising out of a goodwill visit by the President of Chile to Brazil, concessions for Chilean nitrates in the Brazilian market were obtained.

As from October 1, 1947, Chilean customs duties upon a wide range of commodities were increased by percentages varying up to 30 per cent. In addition, there was published by decree dated August 11, a long list of articles, the importation of which into Chile was prohibited until December 31, 1947. This list went far beyond articles which can be manufactured in Chile or which may be styled luxury goods, and if prolonged for any length of time, must substantially affect the standard of living in this Republic.

The official rates of exchange were maintained throughout the year, but the "free" rate for the United States dollar depreciated to around 52 pesos. Intensifying the efforts made to conserve foreign exchange by prohibiting the importation of certain goods, a decree was gazetted on October 27, which materially tightened the control exercised by the government over the commercial banks in the utilization of available exchange. In terms of this decree, banks may only dispose of foreign exchange purchased, under direct instructions by the National Trade Council.

Strikes in Majority of Productive Industries Affect Trade

General trading and especially mineral and nitrate exports were adversely affected during the year by a series of strikes in most of the productive industries. This unrest was due to a large extent to the infiltration of communist elements and cannot be said to have been related always to the ruling labour conditions. In October, a temporary state of emergency was declared in the provinces where the coal mines were situated, with operations proceeding under military control. It was alleged that much of the unrest had been fostered and even organized by agents of the foreign powers with whom Chile recently severed diplomatic relations.

During the year, the Chilean Government endeavoured to curb the continued rise in the cost of living by fixing prices for articles of prime necessity and measures were taken against a number of retailers for infringement of the regulations. The index figure for the cost of living, however, pursued its rapid upward trend, and at November, 1947, stood at 710 as compared with 242.3 in 1941 and 487.3 at June, 1946 (base 1928=100).

What to Export, Where to Export and How to Export are three basic questions confronting any firm entering the export trade. Success or failure depends on the consideration given to these questions and the care with which they are answered. (See our *ABC of Canadian Export Trade*, page 11.)

United Kingdom Government Warns Industry to Hold Wage Levels

No assistance forthcoming if wages allowed to rise without increasing production—Closer control of prices and profits to be maintained for protection of wage-earners.

By A. E. Bryan, Commercial Counsellor for Canada

LONDON, February 6, 1948.—Industries in Great Britain have been warned that, if they allow wages to rise without increasing production, they cannot expect any assistance from the government. The principles laid down as a guide to all who contribute to the settlement of the amount of personal incomes are:

- (a) It is not desirable to interfere directly with incomes, except by taxation.
- (b) Collective agreements should be strictly observed.
- (c) In present conditions, and until more goods and services are available for the home market, there is no justification for any general increase of incomes.
- (d) It does not follow that it would be right to stabilize all incomes as they stand today.
- (e) There is no justification at present for any rise in incomes from profits, rents, or similar sources.

The danger of inflation will be accentuated by the drive to achieve a balance of payments, thereby reducing the volume of goods on the home market. It is essential, therefore, that there should be no further general increase in the level of personal incomes without at least a corresponding increase in the volume of production.

Government to Extend Ceiling Price Regulations

As regards prices, the government intend to make orders to impose a ceiling, at the level ruling for the two months ending January 31, 1948, on manufactured prices of all goods which come within the price control system and which have not already a sufficiently close price control. Margins for distributors will at the same time be prescribed for these goods.

In the case of articles for which the cost-plus form of control is the most suitable, the orders will provide that any increases in labour costs attributable to a wage increase granted after the date of the Personal Incomes White Paper shall not, except in agreement with the Board of Trade, be taken into account in fixing prices.

The above regulations will affect practically all less-essential consumer goods, which, with the exception of books, newspapers and jewellery, are covered by the Prices of Goods Act. This Act limits prices to the cost, plus the cash margin received by the trader in August, 1939, for comparable goods. Foodstuffs and essential goods are already subject to strict price control. The legislation will not apply to raw materials, capital goods and commodities for export.

Reduction of Overall and Distributed Profits Result

The halt in prices, and the efforts to decrease them, will lead to reductions in overall and distributed profits. The government considers

that the curtailment of profits will produce more satisfactory results than the increase of taxation, because everyone benefits from price decreases. At the same time it will remove the objection from wage-earners that too large a share from the sale of goods is going into profits.

The Chancellor of the Exchequer has approached leading organizations of manufacturers and distributors, inviting them to work out some plan for price and profit decreases and to report their proposals within a month. These organizations have responded favourably and are now engaged in a study of ways and means of co-operating in the policies suggested.

Federation of Malaya Inaugurated

Singapore, February 2, 1948. (FTS)—The inauguration yesterday at Kuala Lumpur of the Federation of Malaya represents a substantial advance in the political development of that country, as it provides for increased co-operation on the part of the rulers of the native states with the central government. Provision has also been made for greater participation in the government of the country by the various indigenous and other racial elements in the population. Changes in administration are also involved.

Singapore remains a separate crown colony, while the Federation comprises the British territory formerly included in the Malayan Union, with the exception of Singapore Island. It was generally agreed that the Malayan Union represented little more than a temporary post-liberation arrangement, to be replaced as soon as possible by a new government and administrative machinery.

Correspondence with firms in Singapore should indicate only the name of the firm concerned, the street address and the name "Singapore". Letters to firms in the Federation of Malaya should indicate the name of the firm concerned, the street address, name of city or town and that of the country, "Federation of Malaya".

Sir Edward Gent, former Governor of the Malayan Union, has been named High Commissioner for the United Kingdom in the Federation of Malaya.

Trade Agreement Reached Between Great Britain and Switzerland

London, February 4, 1948.—(FTS)—Provision has been made for payments between Great Britain and Switzerland to be brought into balance under an agreement recently reached by the governments of these two countries. During the year 1947-48, the sterling area had an excess of imports in its trade with Switzerland. Under the agreement, Switzerland will continue to hold the sterling balance of £15,000,000, which she accumulated under the Monetary Agreement of 1946.

Switzerland has undertaken to increase its imports from the sterling area by authorizing the importation of all classes of goods of sterling area origin. However, the Swiss Government will control the volume of exports to the sterling area, so as to keep it within the limits necessary to maintain the balance of payments.

These arrangements will enable the United Kingdom Government to re-open tourist traffic to Switzerland and to grant increased facilities "on a moderate scale" for the import of a large number of traditional Swiss goods.

Trade and Tariff Regulations

Brazilian Import Licensing Law Now Effective

Rio de Janeiro, February 26, 1948.—(FTS)—The Brazilian import licensing law has been approved by the President and published in the *Official Gazette* of February 25, 1948, from which date all imports into Brazil, except essential foods, cement and pharmaceutical products, will require a licence. (Editor's Note—Notice of the passing of the foregoing law was given in last week's issue of *Foreign Trade*. Further details will be published as soon as received.)

Fiji Amends Value for Duty Basis and Form of Invoice

Wellington, February 13, 1948.—(FTS)—Effective January 1, 1948, the value for duty of goods subject to ad valorem rates on importation into Fiji shall be the price which an importer would give for the article (including the cost of packing, cartage, rail freight, dock and port charges, storage, ocean freight, insurance and similar charges) delivered on a wharf or into a lighter at the port of import, according to Fiji Customs Duties Ordinance No. 30 of 1947. Heretofore, the value for duty has been the price which an importer would give for the article (including the cost of packing) delivered on board vessel at port of export.

The same Fiji Ordinance revises present commercial invoicing requirements so that the form of invoice may conform to the revised basis of value for duty. The invoice form remains valid, but the list of charges at the bottom of the present invoice form are deleted and the following are substituted: labour in packing the goods into outside packages; value of outside packages; cartage to rail and/or docks; inland freight (rail or canal); dock and port charges; ocean freight; insurance; and other charges including storage and buying commissions.

United States Requires Deposit of Full Rate of Duty on Table Potatoes

Washington, February 27, 1948.—(FTS)—The United States Bureau of Customs have announced that the quota of one million bushels of white or Irish potatoes, other than certified seed, admissible in the 12-month period beginning September 15, 1947, at a reduced rate of 37½ cents per 100 pounds, as provided by the General Agreement on Trade and Tariffs, signed at Geneva on October 30, 1947, was 75 per cent filled on February 21. On this account importers are required as from March 1, 1948, to deposit estimated duties at the full rate of 75 cents per 100 pounds on all imports of potatoes, other than certified seed potatoes, pending determination of the quota status of the importations.

The corresponding tariff-rate quota of two and a half million bushels of certified seed potatoes was approximately 68 per cent filled on February 21.

For a firm with its own export department, one of the best means of building up a solid export trade is to appoint resident agents abroad. Usually each Canadian firm with favourable export possibilities is deluged with letters from such overseas firms and the problem is one of making the best choice. (See our *ABC of Canadian Export Trade*, page 13.)

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, with a view to establishing connections that will assist in the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following offices in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Calgary—Board of Trade.

Edmonton—Can. Manufacturers' Association.

Gananoque—Chamber of Commerce.

Halifax—Board of Trade.

Hamilton—Chamber of Commerce.

Montreal—Montreal Board of Trade.

Pembroke—Chamber of Commerce.

Quebec City—Board of Trade.

Renfrew—Board of Trade.

Saint John—Board of Trade.

Toronto—Can. Manufacturers' Association.

Vancouver—H. W. Brighton, Foreign Trade Service, Room 331, Marine Building.

Victoria—Dept. of Trade and Industry.

Windsor—Chamber of Commerce.

Winnipeg—Can. Manufacturers' Association.

W. G. Stark, until recently Commercial Secretary for Canada in Lima, Peru, is at present making a tour of Canada before resuming his service abroad. He will discuss trade with Peru and Ecuador with businessmen in the cities listed below on the named dates.

W. G. Stark

(Formerly stationed in Lima, Peru, as Commercial Secretary for Canada)

Montreal—February 23-March 10.
Pembroke—March 11.

Renfrew—March 12.
Ottawa—March 15-18.

Import Permits Required for Additional Items

Effective March 1, 1948, individual import permits are required for the importation of the goods, equipment and materials listed below, unless they were shipped and were in continuous and uninterrupted transit to Canada on or before February 29, 1948. Tariff item No. 393—Tires, of steel, in the rough, not drilled or machined in any manner, for railway vehicles, including locomotives and tenders; tariff item No. 427e—automatic machines for making and packaging cigars and cigarettes, not to include tobacco-preparing machines; tariff item No. 434—locomotives for use on railways, and chassis, tops, wheels and bodies for the same, n.o.p.; tariff item No. 434b—steel wheels for use on railway rolling stock, viz; (i) pressed steel, (ii) n.o.p.; tariff item No. ex446—electric steam turbo generator sets, 700 h.p. and greater, of a class or kind not made in Canada; complete parts thereof for production use; tariff item No. 461—safes, including doors; doors and door frames for vaults; scales, balances, weighing beams and strength-testing machines of all kinds, n.o.p.

Application forms, known as Form CG 101, for import permits may be obtained from Collectors of Customs in the larger centres in Canada. Forms may also be obtained from the Capital Goods Import Control Branch, Department of Reconstruction and Supply, Ottawa, with which branch all completed applications should be filed.

The bringing of these items under control represents a further step in the program to conserve foreign exchange and will be followed by similar announcements from time to time.



Ocean-Going Sailing Schedules

Information contained in the following list of sailings, such as destination, port of departure, loading date, name of ship and operator, is furnished by steamship companies and agents concerned. This is the latest available and subject to change after *Foreign Trade* has gone to press, particularly as this relates to the loading date and name of vessel.

The loading date and name of ship are not indicated in some instances, due to the fact that on certain routes information available is not sufficiently definite to mention the steamer that will be placed on a berth for the destination shown. The name of the probable operator is given, however, and exporters should seek further particulars from the operator or agent indicated.

Departures from Montreal

(r) Indicates refrigerated cargo space.

| Destination | Loading Date | Vessel | Operator or Agent |
|--|--------------|--------------------------|--|
| Africa-East— Lourenço Marques... | April 25-30 | <i>Cumberland County</i> | March Shipping |
| Africa-South— Cape Town..... Port Elizabeth..... East London..... Durban..... | April 25-30 | <i>Cumberland County</i> | March Shipping |
| Belgium— Antwerp..... | April 17-26 | <i>Marchcape</i> | March Shipping |
| Ceylon— Colombo..... | April 20-25 | <i>Riverside</i> | March Shipping |
| China— Shanghai..... | April 20-25 | <i>Riverside</i> | March Shipping |
| France— Le Havre..... | April 17-26 | <i>Marchcape</i> | March Shipping |
| Hong Kong | April 20-25 | <i>Riverside</i> | March Shipping |
| India— Bombay..... Madras..... Calcutta..... | April 20-25 | <i>Riverside</i> | March Shipping |
| New Zealand— Auckland..... Wellington..... Lyttelton..... Dunedin..... | Late April | <i>A Ship</i> | Montreal Australia New Zealand Line |
| Singapore | April 20-25 | <i>Riverside</i> | March Shipping |

Départures from Halifax

*Sails from Saint John about three days earlier.

(r) Indicates refrigerated cargo space.

| Destination | Loading Date | Vessel | Operator or Agent |
|--|--------------|---------------------|-------------------|
| Africa-East— Lourenço Marques... | March 15-20 | <i>Digby County</i> | March Shipping |

Departures from Halifax—Continued

| Destination | Loading Date | Vessel | Operator or Agent |
|----------------------------|----------------|---|--------------------|
| Africa—South— | | | |
| Cape Town.....} | March 15-20 | <i>Digby County</i> | March Shipping |
| Port Elizabeth.....} | | | |
| East London.....} | | | |
| Durban.....} | | | |
| Argentina— | | | |
| Buenos Aires..... | March 22-26 | <i>Royal Prince</i> | Furness Withy |
| Belgian Congo— | | | |
| Matadi..... | March 15-20 | <i>Digby County</i> | March Shipping |
| Belgium— | | | |
| Antwerp..... | Mar. 26-Apr. 2 | <i>Scin</i> | Furness Withy |
| Brazil— | | | |
| Rio de Janeiro.....} | March 22-26 | <i>Royal Prince</i> | Furness Withy |
| Santos.....} | | | |
| Ceylon— | | | |
| Colombo..... | March 20 | <i>Rockside</i> | March Shipping |
| China— | | | |
| Shanghai..... | March 12 | <i>St. Thomas</i> | March Shipping |
| Shanghai..... | March 20 | <i>Rockside</i> | March Shipping |
| Shanghai..... | March 27-30 | <i>Agamemnon</i> | Cunard Donaldson |
| Denmark— | | | |
| Copenhagen..... | March 8-15 | <i>Ragnhildsholm</i> | Swedish American |
| Egypt— | | | |
| Port Said.....} | March 8-10 | <i>Bantam</i> <i>Salatiga</i> | Cunard Donaldson |
| Suez..... | March 27-30 | | Cunard Donaldson |
| Finland— | | | |
| Helsinki..... | March 8-15 | <i>Ragnhildsholm</i> | Swedish American |
| France— | | | |
| Marseilles..... | March 7-11 | <i>Capo Vita</i> | Furness Withy |
| Gibraltar | March 12 | <i>Liguria</i> | Montreal Shipping |
| | March 18-25 | <i>Mont Gaspe</i> | Montreal Shipping |
| Greece— | | | |
| Piraeus..... | March 18-25 | <i>Mont Gaspe</i> | Montreal Shipping |
| Hong Kong | March 12 | <i>St. Thomas</i> | March Shipping |
| | March 20 | <i>Rockside</i> | March Shipping |
| | March 27-30 | <i>Agamemnon</i> | Cunard Donaldson |
| Iceland— | | | |
| Reykjavik..... | March 10-13 | <i>Reykjafoss</i> | F. K. Warren |
| India and Pakistan— | | | |
| Bombay.....} | March 20 | <i>Rockside</i> | March Shipping |
| Calcutta.....} | | | |
| Madras.....} | | | |
| Italy— | | | |
| Genoa.....} | March 12 | <i>Liguria</i> | Montreal Shipping |
| Naples.....} | | | |
| West Coast Ports... | March 7-11 | <i>Capo Vita</i> | Furness Withy |
| | March 18-25 | <i>Mont Gaspe</i> | Montreal Shipping |
| Malaya— | | | |
| Penang.....} | March 8-10 | <i>Bantam</i> <i>Cape San Diego</i> <i>Salatiga</i> | Cunard Donaldson |
| Port Swettenham... | March 22-24 | | Pickford and Black |
| | March 27-30 | | Cunard Donaldson |
| Malta | March 18-25 | <i>Mont Gaspe</i> | Montreal Shipping |

Departures from Halifax—Continued

| Destination | Loading Date | Vessel | Operator or Agent |
|------------------------------------|--|--|--|
| Mediterranean— | | | |
| Central and Western Areas..... | March 12 March 18-25 | <i>Liguria</i> <i>Mont Gaspe</i> | Montreal Shipping Montreal Shipping |
| Netherlands East Indies— | | | |
| Batavia..... | March 8-10 | <i>Bantam</i> | Cunard Donaldson |
| Cheribon..... | March 22-24 | <i>Cape San Diego</i> | Pickford and Black |
| Samarang..... | March 27-30 | <i>Salatiga</i> | Cunard Donaldson |
| Soerabaya..... | | | |
| Newfoundland— | | | |
| St. John's..... | March 6-9 | <i>Island Connector</i> | Newfoundland Canada |
| St. John's..... | March 10-12 | <i>Mayhaven</i> | Shaw Steamships |
| St. John's..... | March 12-15 | <i>Blue Peter II</i> (r) | Montreal Shipping |
| St. John's..... | March 13-18 | <i>Nova Scotia</i> | Furness Withy |
| St. John's..... | March 15-18 | <i>Island Connector</i> | Newfoundland Canada |
| St. John's..... | March 17 | <i>North Pioneer</i> | Clarke Steamships |
| St. John's..... | March 21-23 | <i>Mayhaven</i> | Shaw Steamships |
| St. John's..... | March 26-29 | <i>Blue Peter II</i> (r) | Montreal Shipping |
| St. John's..... | March 27-31 | <i>Miss Glenburnie</i> | Rowlings Limited |
| Norway— | | | |
| Oslø..... | | | |
| Statanger..... | March 8-15 | <i>Ragnhildsholm</i> | Swedish American |
| Bergen..... | | | |
| Poland— | | | |
| Gdansk..... | March 8-15 | <i>Ragnhildsholm</i> | Swedish American |
| Gdynia..... | March 31 | <i>Mont Rolland</i> | Montreal Shipping |
| Portugal— | | | |
| Lisbon..... | March 12 | <i>Liguria</i> | Montreal Shipping |
| Lisbon..... | March 25 | <i>Mont Gaspe</i> | Montreal Shipping |
| St. Pierre et Miquelon..... | March 10-12 March 21-23 | <i>Mayhaven</i> <i>Mayhaven</i> | Shaw Steamships Shaw Steamships |
| Siam— | | | |
| Bangkok..... | March 8-10 March 22-24 | <i>Bantam</i> <i>Cape San Diego</i> | Cunard Donaldson Pickford and Black |
| Singapore..... | March 8-10 March 20 March 22-24 March 27-30 | <i>Bantam</i> <i>Rockside</i> <i>Cape San Diego</i> <i>Salatiga</i> | Cunard Donaldson March Shipping Pickford and Black Cunard Donaldson |
| Trieste..... | March 18-25 | <i>Mont Gaspe</i> | Montreal Shipping |
| United Kingdom— | | | |
| Avonmouth..... | March 6-10 | <i>Montreal City</i> | Furness Withy |
| Liverpool..... | March 5-11 | <i>Ascania</i> (r) | Cunard Donaldson |
| Liverpool..... | March 10 | * <i>Empress of Canada</i> (r) | Canadian Pacific |
| Liverpool..... | March 13-18 | <i>Nova Scotia</i> | Furness Withy |
| Liverpool..... | April 7 | * <i>Empress of Canada</i> (r) | Canadian Pacific |
| Liverpool..... | April 16 | <i>Ascania</i> (r) | Cunard Donaldson |
| Southampton..... | March 24 | <i>Aquitania</i> | Cunard Donaldson |
| Swansea..... | March 6-10 | <i>Montreal City</i> | Furness Withy |
| Uruguay— | | | |
| Montevideo..... | March 22-26 | <i>Royal Prince</i> | Furness Withy |
| West Indies— | | | |
| Antigua..... | March 6-15 | <i>Alcoa Polarix</i> | Alcoa Steamships |
| Antigua..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Antigua..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |

Departures from Halifax—Concluded

| Destination | Loading Date | Vessel | Operator or Agent |
|-------------------------|----------------|---------------------------------|-------------------|
| West Indies—Con. | | | |
| Bahamas..... | March 12-17 | <i>Canadian Victor</i> | Canadian National |
| Bahamas..... | Mar. 25-Apr. 2 | <i>Canadian Cruiser</i> (r) | Canadian National |
| Barbados..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| Barbados..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Barbados..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| Bermuda..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| Bermuda..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Bermuda..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| British Guiana..... | March 6-15 | <i>Alcoa Polaris</i> | Canadian National |
| British Guiana..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| British Guiana..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| Dominica..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Dominica..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| Grenada..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| Grenada..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Grenada..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| Guadeloupe..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Jamaica..... | March 12-17 | <i>Canadian Victor</i> | Canadian National |
| Jamaica..... | Mar. 25-Apr. 2 | <i>Canadian Cruiser</i> (r) | Canadian National |
| Montserrat..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Montserrat..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| St. Kitts..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| St. Kitts..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| St. Kitts..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| St. Lucia..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| St. Lucia..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| St. Lucia..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| St. Vincent..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| St. Vincent..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| St. Vincent..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |
| Trinidad..... | March 6-15 | <i>Alcoa Polaris</i> | Alcoa Steamships |
| Trinidad..... | March 10-18 | <i>Canadian Constructor</i> (r) | Canadian National |
| Trinidad..... | Mar. 26-Apr. 4 | * <i>Lady Nelson</i> (r) | Canadian National |

Departures from Saint John

(r) Indicates refrigerated cargo space.

| Destination | Loading Date | Vessel | Operator or Agent |
|----------------------|--------------|------------------------|--|
| Africa East— | | | |
| Lourenço Marques... | March 3-14 | <i>Graigaur</i> | Elder Dempster |
| | March 15-25 | <i>Cargill</i> | Elder Dempster |
| | April 1-10 | <i>Cottrell</i> | Elder Dempster |
| | April 15-25 | <i>Kawartha Park</i> | Elder Dempster |
| Africa-South— | | | |
| Cape Town..... | March 3-14 | <i>Graigaur</i> | Elder Dempster |
| Port Elizabeth..... | March 15-25 | <i>Cargill</i> | Elder Dempster |
| East London..... | April 1-10 | <i>Cottrell</i> | Elder Dempster |
| Durban..... | April 15-25 | <i>Kawartha Park</i> | Elder Dempster |
| Australia— | | | |
| Melbourne..... | March 22-31 | <i>City of Bristol</i> | Montreal Australia New Zealand Line |
| Sydney..... | | | |
| Brisbane..... | | | |
| Melbourne..... | April 20 | <i>A Ship</i> | Montreal Australia New Zealand Line |
| Sydney..... | | | |
| Brisbane..... | | | |
| Adelaide..... | | | |

Departures from Saint John—Continued

| Destination | Loading Date | Vessel | Operator or Agent |
|----------------------------|----------------|-------------------------------|--------------------|
| Belgium— | | | |
| Antwerp..... | March 8 | <i>Mont Alta</i> | Montreal Shipping |
| Antwerp..... | March 3-10 | <i>Marchcape</i> | Montreal Shipping |
| Antwerp..... | March 14 | <i>Beaverbrae</i> | Canadian Pacific |
| Antwerp..... | March 16 | <i>Prins Frederik Hendrik</i> | Shipping Limited |
| Antwerp..... | March 18-25 | <i>Brant County</i> | Canada Steamships |
| Antwerp..... | March 19-25 | <i>Mont Sorrel</i> | Montreal Shipping |
| Antwerp..... | March 27 | <i>Prins Willem II</i> | Shipping Limited |
| Antwerp..... | Mar. 27-Apr. 2 | <i>Mont Rolland</i> | Montreal Shipping |
| Antwerp..... | April 1-8 | <i>Beckenham</i> | Cunard Donaldson |
| Antwerp..... | April 1-8 | <i>Mont Sandra</i> | Montreal Shipping |
| China— | | | |
| Shanghai..... | March 23-27 | <i>City of Lucknow</i> | McLean Kennedy |
| Ceylon— | | | |
| Colombo..... | March 5-10 | <i>City of Lichfield</i> | McLean Kennedy |
| Colombo..... | March 18 | <i>City of Swansea</i> | McLean Kennedy |
| Colombo..... | April 5-10 | <i>City of Rochester</i> | McLean Kennedy |
| Colombia— | | | |
| Barranquilla..... | March 16-20 | <i>Apollo (r)</i> | Saguenay Terminals |
| Barranquilla..... | April 13-18 | <i>Benny (r)</i> | Saguenay Terminals |
| Dominican Republic— | | | |
| Ciudad Trujillo.... | March 20-25 | <i>Wentworth Park</i> | Saguenay Terminals |
| Egypt— | | | |
| Alexandria..... | March 5-10 | <i>City of Lichfield</i> | McLean Kennedy |
| Port Sudan..... | April 5-10 | <i>City of Rochester</i> | McLean Kennedy |
| Elre— | | | |
| Dublin..... | March 16-20 | <i>Lord Glentoran</i> | McLean Kennedy |
| Dublin..... | April 10-15 | <i>Fanad Head</i> | McLean Kennedy |
| Dublin..... | March 12 | <i>Irish Larch</i> | Shipping Limited |
| Cork..... | | | |
| France— | | | |
| Le Havre..... | March 3-10 | <i>Marchcape</i> | March Shipping |
| Le Havre..... | March 18-25 | <i>Brant County</i> | Canada Steamships |
| Le Havre..... | March 19-25 | <i>Mont Sorrel</i> | Montreal Shipping |
| Le Havre..... | Mar. 27-Apr. 2 | <i>Mont Rolland</i> | Montreal Shipping |
| Le Havre..... | April 1-8 | <i>Mont Sandra</i> | Montreal Shipping |
| Germany— | | | |
| Hamburg..... | March 3-10 | <i>Marchcape</i> | Montreal Shipping |
| Hamburg..... | March 24-31 | <i>Mont Rolland</i> | Montreal Shipping |
| Hamburg..... | April 1-8 | <i>Mont Sandra</i> | Montreal Shipping |
| Haiti— | | | |
| Port au Prince..... | March 20-25 | <i>Wentworth Park</i> | Saguenay Terminals |
| Hong Kong..... | March 23-27 | <i>City of Lucknow</i> | McLean Kennedy |
| India and Pakistan— | | | |
| Karachi..... | March 5-10 | <i>City of Lichfield</i> | McLean Kennedy |
| Bombay..... | March 18 | <i>City of Swansea</i> | McLean Kennedy |
| Calcutta..... | April 5-10 | <i>City of Rochester</i> | McLean Kennedy |
| Madras..... | | | |
| Mexico— | | | |
| Veraacruz..... | April 21 | <i>Federal Pioneer</i> | McLean Kennedy |
| Netherlands— | | | |
| Rotterdam..... | March 6-10 | <i>Marchcape</i> | March Shipping |
| Rotterdam..... | March 8 | <i>Mont Alta</i> | Montreal Shipping |
| Rotterdam..... | March 18-25 | <i>Brant County</i> | Canada Steamships |
| Rotterdam..... | March 19-25 | <i>Mont Sorrel</i> | Montreal Shipping |
| Rotterdam..... | March 27 | <i>Prins Willem II</i> | Shipping Limited |
| Rotterdam..... | Mar. 27-Apr. 2 | <i>Mont Rolland</i> | Montreal Shipping |
| Rotterdam..... | April 1-8 | <i>Mont Sandra</i> | Montreal Shipping |
| Rotterdam..... | March 16 | <i>Prins Frederik Hendrik</i> | Shipping Limited |
| Amsterdam..... | | | |

Departures from Saint John—Concluded

| Destination | Loading Date | Vessel | Operator or Agent |
|---------------------------------|----------------|--------------------------------|--|
| Netherlands West Indies— | | | |
| Curacao..... | March 16-20 | <i>Apollo</i> (r) | Saguenay Terminals |
| Curacao..... | April 13-18 | <i>Benny</i> (r) | Saguenay Terminals |
| New Zealand— | | | |
| Auckland..... | March 22-31 | <i>City of Bristol</i> | Montreal Australia New Zealand Line |
| Wellington..... | | | |
| Lyttelton..... | | | |
| Northern Ireland— | | | |
| Belfast..... | March 16-20 | <i>Lord Glentoran</i> | McLean Kennedy |
| Belfast..... | April 10-15 | <i>Fanad Head</i> | McLean Kennedy |
| Norway— | | | |
| Oslo..... | March 17-18 | <i>Lyngenfjord</i> | March Shipping |
| Kristiansand..... | | | |
| Stavanger..... | | | |
| Bergen..... | | | |
| Philippines— | | | |
| Manila..... | March 23-27 | <i>City of Lucknow</i> | McLean Kennedy |
| Poland— | | | |
| Gdynia..... | March 3-10 | <i>Marchcape</i> | March Shipping |
| Gdynia..... | Mar. 27-Apr. 2 | <i>Mont Rolland</i> | Montreal Shipping |
| United Kingdom— | | | |
| Avonmouth..... | March 10-17 | <i>Carmia</i> (r) | Cunard Donaldson |
| Avonmouth..... | Mar. 27-Apr. 3 | <i>Norwegian</i> (r) | Cunard Donaldson |
| Glasgow..... | March 13-20 | <i>Moveria</i> (r) | Cunard Donaldson |
| Glasgow..... | April 6-13 | <i>Delilian</i> (r) | Cunard Donaldson |
| Glasgow..... | April 9-16 | <i>Carmia</i> | Cunard Donaldson |
| Hull..... | March 16-20 | <i>Consuelo</i> (r) | McLean Kennedy |
| Leith..... | March 22-27 | <i>Cairnaxon</i> | Furness Withy |
| Liverpool..... | March 12-15 | <i>Empress of Canada</i> (r) | Canadian Pacific |
| Liverpool..... | March 16-20 | <i>Lord Glentoran</i> | McLean Kennedy |
| Liverpool..... | Mar. 26-Apr. 2 | <i>Hillcrest Park</i> | Cunard Donaldson |
| Liverpool..... | Mar. 29-Apr. 7 | <i>Port Sydney</i> (r) | Cunard Donaldson |
| Liverpool..... | April 7 | <i>Empress of Canada</i> (r) | Canadian Pacific |
| Liverpool..... | April 10-15 | <i>Fanad Head</i> | McLean Kennedy |
| London..... | March 6-9 | <i>Ottawa Valley</i> | Cunard Donaldson |
| London..... | March 10-16 | <i>Beaverdell</i> (r) | Canadian Pacific |
| London..... | March 12-16 | <i>Beaverburn</i> (r) | Canadian Pacific |
| London..... | March 16-25 | <i>Port Melbourne</i> (r) | Cunard Donaldson |
| London..... | March 18 | <i>Beaver Glen</i> (r) | Canadian Pacific |
| London..... | March 22-30 | <i>Asia</i> (r) | Cunard Donaldson |
| Manchester..... | March 8-13 | <i>Manchester</i> | |
| Manchester..... | March 15-20 | <i>Commerce</i> (r) | Furness Withy |
| Manchester..... | March 22-27 | <i>Manchester City</i> (r) | Furness Withy |
| Manchester..... | Mar. 29-Apr. 3 | <i>Manchester Regiment</i> (r) | Furness Withy |
| Manchester..... | | <i>Manchester Progress</i> (r) | Furness Withy |
| Newcastle..... | March 22-27 | <i>Cairnaxon</i> | Furness Withy |
| West Indies— | | | |
| British Guiana..... | March 20-25 | <i>Wentworth Park</i> | Saguenay Terminals |
| Venezuela— | | | |
| La Guaira..... | March 16-20 | <i>Apollo</i> (r) | Saguenay Terminals |
| Maracaibo..... | April 13-18 | <i>Benny</i> (r) | Saguenay Terminals |
| La Guaira..... | March 20-25 | <i>Wentworth Park</i> | Saguenay Terminals |
| Puerto Cabello..... | | | |

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

| Destination | Loading Date | Vessel | Operator or Agent |
|----------------------|----------------|-------------------------------|------------------------|
| Africa-East— | | | |
| Lourenço Marques... | March 14-31 | <i>Lake Okanagan</i> | North Pacific Shipping |
| Lourenço Marques... | March 15 | <i>Silversandal</i> | Dingwall Cotts |
| Lourenço Marques... | April | <i>Radja</i> | Dingwall Cotts |
| Lourenço Marques... | May | <i>Silverteak</i> | Dingwall Cotts |
| Africa-South— | | | |
| Cape Town..... | March 15 | <i>Silversandal</i> | Dingwall Cotts |
| Port Elizabeth..... | April | <i>Radja</i> | Dingwall Cotts |
| East London..... | May | <i>Silverteak</i> | Dingwall Cotts |
| Durban..... | | | |
| Cape Town..... | March 6-20 | <i>Tureby</i> | North Pacific Shipping |
| Port Elizabeth..... | | | |
| Durban..... | | | |
| East London..... | March 14-31 | <i>Lake Okanagan</i> | North Pacific Shipping |
| Durban..... | | | |
| Africa-West— | | | |
| Walvis Bay..... | March 14-31 | <i>Lake Okanagan</i> | North Pacific Shipping |
| Australia— | | | |
| Melbourne..... | April 30 | <i>Waitemata</i> | Canadian Australasian |
| Sydney..... | April 8 | <i>Wairuna</i> | Canadian Australasian |
| Sydney..... | March 24 | <i>Waitomo</i> | Canadian Australasian |
| Hobart..... | | | |
| Sydney..... | March | <i>Mirrabooka</i> | Empire Shipping |
| Melbourne..... | April 20 | <i>Parrakoola</i> | Empire Shipping |
| Adelaide..... | | | |
| Brisbane..... | March 8 | <i>Mongabarra</i> | Empire Shipping |
| Sydney..... | March 17 | <i>Mattawunga</i> | Empire Shipping |
| Melbourne..... | | | |
| Adelaide..... | | | |
| Belgium— | | | |
| Antwerp..... | March 16 | <i>Panama</i> (r) | Gardner Johnson |
| Antwerp..... | March 22 | <i>Seattle</i> (r) | Gardner Johnson |
| Antwerp..... | April 25 | <i>Paraguay</i> (r) | Gardner Johnson |
| Burma— | | | |
| Rangoon..... | March 23-24 | <i>Washington Mail</i> | American Mail Line |
| Rangoon..... | April 5 | <i>Samarinda</i> | Dingwall Cotts |
| Rangoon..... | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Canal Zone— | | | |
| Balboa..... | March 9 | <i>Anchor Hitch</i> (r) | Gardner Johnson |
| Balboa..... | March 19 | <i>Santa Juana</i> (r) | Gardner Johnson |
| Balboa..... | March 31 | <i>Coastal Adventurer</i> (r) | Gardner Johnson |
| Ceylon— | | | |
| Colombo..... | March 10 | <i>Manx Marine</i> | Dingwall Cotts |
| Colombo..... | March 18 | <i>Lombok</i> | Dingwall Cotts |
| Colombo..... | March 23-24 | <i>Washington Mail</i> (r) | American Mail Line |
| Colombo..... | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Chile— | | | |
| Arica..... | March 19 | <i>Santa Juana</i> (r) | Gardner Johnson |
| Antofagasta..... | | | |
| Valparaiso..... | | | |
| China— | | | |
| Shanghai..... | Mar. 18-Apr. 2 | <i>Lake Tailla</i> | Empire Shipping |
| Shanghai..... | April 1-2 | <i>Java Hill</i> | American Mail Line |
| Shanghai..... | Apr. 19-May 4 | <i>Lake Cowichan</i> | Anglo Canadian |

Departures from Vancouver—Continued

| Destination | Loading Date | Vessel | Operator or Agent |
|-------------------------------|----------------|-------------------------------|-----------------------|
| China—Con. | | | |
| Shanghai..... | March 12-13 | <i>China Mail</i> (r) | American Mail Line |
| Taku Bar..... | April 13-14 | <i>Canada Mail</i> | American Mail Line |
| | April 14 | <i>Vilja</i> | Empire Shipping |
| Colombia— | | | |
| Buenaventura..... | March 19 | <i>Santa Juana</i> (r) | Gardner Johnson |
| Cook Islands— | | | |
| Raratonga..... | April 8 | <i>Wairuna</i> | Canada Australasian |
| Costa Rica— | | | |
| Puntarenas..... | March 9 | <i>Anchor Hitch</i> (r) | Gardner Johnson |
| Ecuador— | | | |
| Guayaquil..... | March 19 | <i>Santa Juana</i> | Gardner Johnson |
| Fiji Islands— | | | |
| Lautoka..... | March 24 | <i>Waitomo</i> | Canadian Australasian |
| Suva..... | March 18 | <i>Wairata</i> | Canadian Australasian |
| Greece— | | | |
| Piraeus..... | March | <i>John B. Hamilton</i> | Empire Shipping |
| Guatemala— | | | |
| Champerico..... | March 9 | <i>Anchor Hitch</i> (r) | Gardner Johnson |
| San Jose..... | | | |
| San Jose..... | March 31 | <i>Coastal Adventurer</i> (r) | Gardner Johnson |
| Honduras— | | | |
| Amapala..... | March 9 | <i>Anchor Hitch</i> (r) | Gardner Johnson |
| Amapala..... | March 31 | <i>Coastal Adventurer</i> (r) | Gardner Johnson |
| Hong Kong..... | March | <i>Andaman</i> | Gardner Johnson |
| | March 12-13 | <i>China Mail</i> (r) | American Mail Line |
| | March 14 | <i>Castleville</i> | Balfour Guthrie |
| | April 1-2 | <i>Java Mail</i> | American Mail Line |
| | April 13-14 | <i>Canada Mail</i> | American Mail Line |
| | April 14 | <i>Francisville</i> | Balfour Guthrie |
| India and Pakistan— | | | |
| Madras..... | March 18 | <i>Lombok</i> | Dingwall Cotts |
| Bombay..... | March 10 | <i>Manz Marine</i> | Dingwall Cotts |
| Karachi..... | | | |
| Madras..... | March 23-24 | <i>Washington Mail</i> (r) | American Mail Line |
| Calcutta..... | April 5 | <i>Samarinda</i> | Dingwall Cotts |
| | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Italy— | | | |
| Genoa..... | March | <i>John B. Hamilton</i> | Empire Shipping |
| Japan— | | | |
| Yokohama..... | March 12-13 | <i>China Mail</i> (r) | American Mail Line |
| Yokohama..... | March 23-24 | <i>Washington Mail</i> (r) | American Mail Line |
| Yokohama..... | April 1-2 | <i>Java Mail</i> | American Mail Line |
| Yokohama..... | April 13-14 | <i>Canada Mail</i> | American Mail Line |
| Yokohama..... | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Malaya— | | | |
| Penang..... | March 14 | <i>Castleville</i> | Balfour Guthrie |
| Port Swettenham... | March 18 | <i>Lombok</i> | Dingwall Cotts |
| | March 23-24 | <i>Washington Mail</i> (r) | American Mail Line |
| | April 14 | <i>Francisville</i> | Balfour Guthrie |
| | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Mediterranean— | | | |
| Central and Western Area..... | Mar. 21-Apr. 5 | <i>Lake Athabasca</i> | Canada Shipping |
| Mexico— | | | |
| Manzanillo..... | March 9 | <i>Anchor Hitch</i> (r) | Gardner Johnson |
| Acapulco..... | | | |

Departures from Vancouver—Continued

| Destination | Loading Date | Vessel | Operator or Agent |
|---------------------------------|----------------|-------------------------------|-----------------------|
| Netherlands East Indies— | | | |
| Batavia..... | March 10 | <i>Manx Marine</i> | Dingwall Cotts |
| Soerabaya..... | March 14 | <i>Castleville</i> | Balfour Guthrie |
| | March 23-24 | <i>Washington Mail (r)</i> | American Mail Line |
| | April 5 | <i>Samarinda</i> | Dingwall Cotts |
| | April 10 | <i>Höegh Silvercrest</i> | Dingwall Cotts |
| | April 14 | <i>Francisville</i> | Balfour Guthrie |
| | April 23-24 | <i>Oregon Mail</i> | Balfour Guthrie |
| New Zealand— | | | |
| Auckland..... | March 18 | <i>Wairata</i> | Canadian Australasian |
| Wellington..... | April 8 | <i>Wairuna</i> | Canadian Australasian |
| | April 30 | <i>Waitemata</i> | Canadian Australasian |
| Nicaragua— | | | |
| Corinto..... | March 9 | <i>Anchor Hitch (r)</i> | Gardner Johnson |
| Palestine— | | | |
| Haifa..... | March | <i>John B. Hamilton</i> | Empire Shipping |
| Peru— | | | |
| Callao..... | March 19 | <i>Santa Juana (r)</i> | Gardner Johnson |
| Mollendo..... | | | |
| Manila..... | March 14 | <i>Castleville</i> | Balfour Guthrie |
| Iloilo..... | April 1-2 | <i>Java Mail</i> | American Mail Line |
| Cebu..... | April 14 | <i>Francisville</i> | Balfour Guthrie |
| Manila..... | March 12-13 | <i>China Mail (r)</i> | American Mail Line |
| Cebu..... | April 5 | <i>Samarinda</i> | Dingwall Cotts |
| | April 13-14 | <i>Canada Mail</i> | American Mail Line |
| Philippines— | | | |
| Manila..... | March 18 | <i>Lombok</i> | Dingwall Cotts |
| Iloilo..... | | | |
| Manila..... | March 10 | <i>Manx Marine</i> | Dingwall Cotts |
| Manila..... | March 23-24 | <i>Washington Mail (r)</i> | American Mail Line |
| Manila..... | April 10 | <i>Höegh Silvercrest</i> | Dingwall Cotts |
| Manila..... | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Manila..... | April 14 | <i>Vilja</i> | Empire Shipping |
| Salvador— | | | |
| Acajutla..... | March 9 | <i>Anchor Hitch (r)</i> | Gardner Johnson |
| La Union..... | March 9 | <i>Anchor Hitch (r)</i> | Gardner Johnson |
| La Libertad..... | | | |
| San Salvador..... | March 31 | <i>Coastal Adventurer (r)</i> | Gardner Johnson |
| Singapore..... | March 10 | <i>Manx Marine</i> | Dingwall Cotts |
| | March 14 | <i>Castleville</i> | Balfour Guthrie |
| | March 18 | <i>Lombok</i> | Dingwall Cotts |
| | March 23-24 | <i>Washington Mail (r)</i> | American Mail Line |
| | April 5 | <i>Samarinda</i> | Dingwall Cotts |
| | April 10 | <i>Höegh Silvercrest</i> | Dingwall Cotts |
| | April 14 | <i>Francisville</i> | Balfour Guthrie |
| | April 23-24 | <i>Oregon Mail</i> | American Mail Line |
| Society Islands— | | | |
| Papeete..... | April 8 | <i>Wairuna</i> | Canadian Australasian |
| Papeete..... | April 30 | <i>Waitemata</i> | Canadian Australasian |
| Sweden— | | | |
| Gothenburg..... | March 16 | <i>Panama (r)</i> | Gardner Johnson |
| Helsingborg..... | March 22 | <i>Seattle (r)</i> | Gardner Johnson |
| Malmö..... | April 25 | <i>Paraguay (r)</i> | Gardner Johnson |
| Stockholm..... | | | |
| Taiwan..... | Mar. 18-Apr. 2 | <i>Lake Tatla</i> | Empire Shipping |
| Tonga— | | | |
| Nukualofa..... | April 30 | <i>Waitemata</i> | Canadian Australasian |

Departures from Vancouver—*Concluded*

| Destination | Loading Date | Vessel | Operator or Agent |
|------------------------|----------------|-------------------------|-----------------------|
| United Kingdom— | | | |
| Liverpool..... | Mid-March | <i>Pacific Exporter</i> | Furness Pacific |
| Manchester..... | | | |
| London..... | | | |
| London..... | March 16 | <i>Panama (r)</i> | Gardner Johnson |
| London..... | March 22 | <i>Seattle (r)</i> | Gardner Johnson |
| London..... | Mar. 24-Apr. 8 | <i>Lake Lillooet</i> | Western Canada |
| London..... | Mar. 25-Apr. 9 | <i>Lake Babine</i> | Western Canada |
| London..... | April 12-27 | <i>Lake Kootenay</i> | Empire Shipping |
| London..... | Apr. 26-May 1 | <i>Lake Sicamous</i> | Anglo Canada Shipping |

Foreign Trade Service

*Head Office Directory

The work of the Service is co-ordinated by an executive committee, of which the undernoted directors are members, and the Deputy Minister of the Department of Trade and Commerce is chairman.

Trade Commissioner Service

Director, G. R. Heasman

Recruiting, training and posting of trade commissioners; direction and supervision of overseas officers; trade inquiries concerning countries and areas.

Export Division

Director, W. F. Bull

General liaison with Canadian export industries; trade inquiries concerning commodities; maintenance of Exporters' Directory; administration of Export Permit Branch.

Import Division

Director, Denis Harvey

Assistance to importers in locating and procuring desirable imports; general import trade inquiries; maintenance of Importers' Directory.

Commercial Relations and Foreign Tariffs Division

Director, H. R. Kemp

Preparation of data pertaining to the negotiation of trade treaties; general economic and commercial policy; maintains complete records of foreign tariffs and trading regulations.

Industrial Development Division

Director, G. D. Mallory

Liaison with other agencies connected with the establishment of new industries; special problems connected with the development of new export business.

Trade Publicity Division

Director, B. C. Butler

Publication of *Foreign Trade*, weekly journal of the Foreign Trade Service, and preparation of brochures, news letters and press releases; advertising programs in Canada and abroad.

*The complete head office directory, as well as the directory of Foreign Commercial Representatives in Canada, appears in the last issue of *Foreign Trade* each month.

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.

Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. BROWN, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.

Territory includes Uruguay and Paraguay.

Buenos Aires—W. B. McCULLOUGH, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

Australia

Sydney—C. M. CROFT, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Sydney—Dr. W. C. HOPPER, Commercial Secretary for Canada (Agricultural Specialist), City Mutual Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Melbourne—F. W. FRASER, Commercial Secretary for Canada, 83 William Street.

Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. AUSMAN, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boite Postale 373.

Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. MACDONALD, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—MAURICE BÉLANGER, Commercial Secretary, Canadian Embassy, Ed. Metropole, Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—J. C. DEPOCAS, Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—J. L. MUTTER, Commercial Secretary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.

Territory includes Bolivia.

China

Shanghai—L. M. COSGRAVE, Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. RICHARDSON, Acting Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.

Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—R. G. C. SMITH, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.

Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—J. M. BOYER, Canadian Government Trade Commissioner, 22 Shari Kasr el Nil. Address for letters: Post Office Box 1770.

Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—YVES LAMONTAGNE, Commercial Counsellor, Canadian Embassy, 3 rue Scribe. Territory includes Switzerland, Algeria, French Morocco and Tunisia.

Paris—J. H. TREMBLAY, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.

Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—D. W. JACKSON, Canadian Economic Representative, % Allied Contact Section, H.Q. EUCOM, Frankfurt, A.P.O. 757, U.S. Army.

Cable address, *Canadian Frankfurt/Main*.

Greece

Athens—T. J. MONTY, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.

Territory includes Turkey.

Guatemala

Guatemala City—C. B. BIRKETT, Canadian Government Trade Commissioner, Post Office Box 400.

Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. NOBLE, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.

Territory includes South China, the Philippine Islands and French Indo-China.

Foreign Trade Service Abroad—Continued

India

Bombay—RICHARD GREW, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.

Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. PRIESTMAN, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Belfast—H. L. E. PRIESTMAN, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—J. P. MANION, Commercial Secretary, Canadian Legation, via Saverio Mercadante 15-17. Address for letters: Casella Postale 475. (Telephones—471-597 and 470-708.)

Territory includes Czechoslovakia, Malta, Yugoslavia and Libya.

Jamaica

Kingston—M. B. PALMER, Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.

Territory includes the Bahamas and British Honduras.

Mexico

Mexico City—D. S. COLE, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. LANGLEY, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—J. C. BRITTON, Commercial Secretary, Office of the High Commissioner for Canada, Circular Road.

New Zealand

Wellington—P. V. McLANE, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 1660. Territory includes Fiji and Western Samoa.

Norway

Oslo—S. G. MacDONALD, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.

Territory includes Denmark and Greenland.

Pakistan

Karachi—G. A. BROWNE, Acting Canadian Government Trade Commissioner. Address for letters: Post Office Box 531.

Peru

Lima—C. J. VAN TICHEM, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.

Territory includes Ecuador.

Portugal

Lisbon—L. S. GLASS, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.

Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—PAUL SYKES, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.

Territory includes Federation of Malaya, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

South Africa

Johannesburg—J. H. ENGLISH, Commercial Counsellor for Canada, Mutual Buildings, Harrison Street. Address for letters: Post Office Box 715.

Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.

Cable address, *Cantracom*.

Cape Town—S. V. ALLEN, Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.

Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.

Cable address, *Cantracom*.

Sweden

Stockholm—F. H. PALMER, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.

Territory includes Finland.

Trinidad

Port-of-Spain—T. G. MAJOR, Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.

Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

Foreign Trade Service Abroad—*Concluded*

United Kingdom

London—A. E. BRYAN, Commercial Counselor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Sleighing, London.

London—R. P. BOWER, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).

Cable address, Sleighing, London.

London—W. B. GORNALL, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Cantracom, London.

London—R. D. ROE, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Timcom, London.

Liverpool—M. J. VECHSLER, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.

Territory includes the Midlands, North of England and Wales.

Glasgow—G. F. G. HUGHES, Acting Canadian Government Trade Commissioner, 200 St. Vincent Street.

Territory covers Scotland and Iceland.

Cable address, Cantracom.

United States

Washington—H. A. SCOTT, Commercial Counselor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. PATERSON, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. STEWART, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.

Territory includes Bermuda.

Cable address, Cantracom.

Chicago—EDMOND TURCOTTE, Consul-General for Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. DUCLOS, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

Venezuela

Caracas—C. S. BISSETT, Canadian Government Trade Commissioner. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, Esq. Veroes.

Territory includes Netherlands West Indies.

In recent years there have been an increasing number of foreign trade visitors coming to Canada. Many of them are agents seeking representation but their members include buyers for departmental stores and importers from abroad. These visitors usually arrive in Canada with letters of introduction from the Canadian Trade Commissioners and banks abroad. In the case of a foreign trade visitor bearing a letter of introduction from the Trade Commissioner, it can be assumed that confidential information as to the status of the visitor is available at the Department of Trade and Commerce in Ottawa. It is the practice of the Department to notify the Boards of Trade, Canadian Manufacturers' Association and Canadian Exporters' Association of any known foreign trade visitors coming to Canada. In the case of foreign trade visitors seeking representation and, as a result of such visits, a Canadian firm already represented in that area abroad is considering switching its agency to the visitor's firm, it is strongly recommended that the Canadian firm consult the Trade Commissioner, or its bank, in the territory concerned, as to the merits of the respective agents before making any final decision. (See our *ABC of Canadian Export Trade*, page 15.)

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

| Country | Monetary Unit | | Nominal Quotations Feb. 23 | Nominal Quotations Mar. 1 |
|---|---------------|--------------|----------------------------|---------------------------|
| Argentina..... | Peso | Off. | .2977 | .2977 |
| | | Free | .2500 | .2495 |
| Australia..... | Pound | .... | 3.2240 | 3.2240 |
| Belgium and Belgian Congo | Franc | .... | .0228 | .0228 |
| Bolivia..... | Boliviano | .... | .0238 | .0238 |
| British West Indies (except Jamaica)..... | Dollar | .... | .8396 | .8396 |
| Brazil..... | Cruzeiro | .... | .0544 | .0544 |
| Chile..... | Peso | Off. | .0517 | .0517 |
| | | Export | .0322 | .0322 |
| Colombia..... | Peso | .... | .5714 | .5714 |
| Cuba..... | Peso | .... | 1.0000 | 1.0000 |
| Czechoslovakia..... | Koruna | .... | .0200 | .0200 |
| Denmark..... | Krone | .... | .2083 | .2083 |
| Ecuador..... | Sucre | .... | .0740 | .0740 |
| Egypt..... | Pound | .... | 4.1330 | 4.1330 |
| Eire..... | Pound | .... | 4.0300 | 4.0300 |
| Fiji..... | Pound | .... | 3.6306 | 3.6306 |
| Finland..... | Markka | .... | .0073 | .0073 |
| France and French North Africa..... | Franc | .... | .0046 | .0046 |
| French Empire—African..... | Franc | .... | .0079 | .0079 |
| French Pacific Possessions..... | Franc | .... | .0201 | .0201 |
| Haiti..... | Gourde | .... | .2000 | .2000 |
| Hong Kong..... | Dollar | .... | .2518 | .2518 |
| Iceland..... | Krona | .... | .1541 | .1541 |
| India..... | Ruppee | .... | .3022 | .3022 |
| Iraq..... | Dinar | .... | 4.0300 | 4.0300 |
| Italy..... | Lira | .... | .0017 | .0017 |
| Jamaica..... | Pound | .... | 4.0300 | 4.0300 |
| Malaya..... | Dollar | .... | .4701 | .4701 |
| Mexico..... | Peso | .... | .2059 | .2059 |
| Netherlands..... | Florin | .... | .3769 | .3769 |
| Netherlands East Indies..... | Florin | .... | .3769 | .3769 |
| Netherlands West Indies..... | Florin | .... | .5302 | .5302 |
| New Zealand..... | Pound | .... | 3.2402 | 3.2402 |
| Norway..... | Krone | .... | .2015 | .2015 |
| Pakistan..... | Ruppee | .... | .3022 | .3022 |
| Palestine..... | Pound | .... | 4.0300 | 4.0300 |
| Peru..... | Sol | .... | .1538 | .1538 |
| Philippines..... | Peso | .... | .5000 | .5000 |
| Portugal..... | Escudo | .... | .0403 | .0403 |
| Siam..... | Baht | .... | .1000 | .1000 |
| Spain..... | Peseta | .... | .0916 | .0916 |
| Sweden..... | Krona | .... | .2783 | .2783 |
| Switzerland..... | Franc | .... | .2336 | .2336 |
| Turkey..... | Lira | .... | .3571 | .3571 |
| Union of South Africa..... | Pound | .... | 4.0300 | 4.0300 |
| United Kingdom..... | Pound | .... | 4.0300 | 4.0300 |
| United States..... | Dollar | .... | 1.0000 | 1.0000 |
| Uruguay..... | Peso | Controlled | .6583 | .6583 |
| | | Uncontrolled | .5629 | .5629 |
| Venezuela..... | Bolivar | .... | .2985 | .2985 |

Trade Publications Available

ABC of Canadian Export Trade

Copies of this publication, prepared by the Export Division, Foreign Trade Service, may be obtained on application to the King's Printer, Government Printing Bureau, for 25 cents a copy in Canada and 50 cents abroad.

Canadian Certified Seed Potatoes

Prepared for distribution abroad, in an effort to stimulate the export sale of potatoes, this illustrated folder specifies the six varieties most suitable for shipment to other countries, the classes of seed, and the three classifications. Other information of interest to prospective purchasers is included.

"Foreign Trade"

Reprint of January 4, 1947, anniversary issue, containing articles on the Canadian Trade Commissioner Service, the history of the *Commercial Intelligence Journal* and preceding weekly publications, short reports from trade commissioners throughout the world on their respective territories, with illustrations.

Economic Reviews

Reports on economic conditions in various countries, reproduced from the *Commercial Intelligence Journal* and *Foreign Trade*, as follows:

| | |
|---------------------------------|------------------------|
| Argentina | Chile |
| Australia | Colombia and Venezuela |
| British West Indies and British | French North Africa |
| Guiana | India |
| Central America | New Zealand |

Reprints of Special Reports

Articles appearing in the *Commercial Intelligence Journal* and *Foreign Trade* have been reprinted in pamphlet form for distribution by commodity officers and others receiving enquiries on the subject concerned, as follows:

Canadian Tobacco—Production and Consumption
Industrial Development in Canada
Canadian Toy Industry
German Industrial Plants Available for Reparation
Trade Procedure for Imports from Germany
The Influence of Geography on Import Trade

Foreign Trade Service Directory

This sets forth the functions of the six divisions of the Foreign Trade Service, with the directors and other leading officials of each. The government telephone numbers are shown for the convenience of exporters and importers. This includes a list of Canadian Trade Commissioners, with their respective postal and cable addresses, agencies associated with the Foreign Trade Service in the development of commerce with other countries, and a list of the Foreign Commercial Representatives in Canada. (This information, with revisions, is reproduced once a month in *Foreign Trade*.)

Trade Bulletins and Reports

Detailed information concerning Canadian foreign trade is compiled by the Dominion Bureau of Statistics, to which application should be made. This is issued on an annual, quarterly and monthly basis. The Dominion Statistician is also responsible for compilation of the *Canada Year Book*, the *Canada Handbook* and a number of reports on specific commodities.

Discuss your Problems with

FOREIGN TRADE SERVICE

OTTAWA
EDMOND CLOUTIER, C.M.G., B.A., L.Ph.,
KING'S PRINTER AND CONTROLLER OF STATIONERY
1948

AN INVITATION TO BUSINESSMEN *on behalf of producers of the world's goods.*

WE INVITE YOU TO THE
**CANADIAN INTERNATIONAL
 TRADE FAIR**

from

MAY 31 TO JUNE 12, 1948 - TORONTO, ONTARIO
... and we think you'll profit by coming

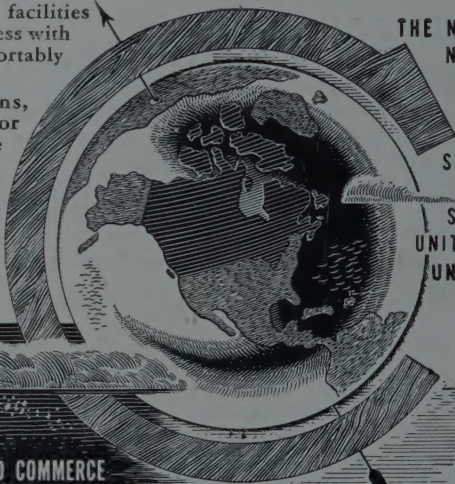
This will be the first International Trade Fair ever to be held in North America. It is sponsored by the Government of Canada.

It will be devoted entirely to business. The general public will not be admitted except on Saturdays. Every exhibit has been accepted on the condition that the goods displayed are for sale and can be delivered within a reasonable time. Transactions can be completed on the spot.

The products of more than 25 countries will be on display, and buyers will come from every quarter of the globe. For the period of this fair, Toronto will be a world market-place—the sample room of the world on your doorstep—within a convenient day's journey from any city in Canada.

Canada will be the host—but the Fair will belong to the traders and businessmen of all the nations. There will be interpreters—special cable and communications services—private restaurants and meeting rooms—all the facilities you need to do business with all the world, comfortably and conveniently.

Official invitations, which are required for admission, may be obtained on application to the Canadian International Trade Fair, Canadian National Exhibition Grounds, Toronto, Canada.



ALGERIA
 AUSTRALIA
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 BRAZIL
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 CHINA
 COLOMBIA
 CYPRUS
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 FRANCE
 GREECE
 INDIA
 ITALY
 JAV
 MALAYA
 MEXICO
 THE NETHERLANDS
 NEW ZEALAND
 NORWAY
 PALESTINE
 PORTUGAL
 SOUTH AFRICA
 SWEDEN
 SWITZERLAND
 UNITED KINGDOM
 UNITED STATES

DEPARTMENT OF TRADE AND COMMERCE
 OTTAWA CANADA

Prototype of advertisement appearing through March, April and May in some 140 Canadian and United States business and trade publications. A slight change occurs in the text for such advertisements reproduced in the United States.